UNDERSTANDING SMALL MUSIC VENUES

A REPORT BY THE MUSIC VENUE TRUST

MUSIC Venue TRUST

PARTNERS FOR VENUES DAY

Supported by ARTS COUNCIL ENGLAND

Arts Council England

Independent Venue Week

The Institute

Music Venues Alliance

The Southbank Centre

UK Music

MUSIC Venue TRUST

March 2015

Contact:

MARK DAVYD. CEO
07778 668225 / mark@musicvenuetrust.com

BEVERLEY WHITRICK. STRATEGIC DIRECTOR
07031 745994 / beverley@musicvenuetrust.com

www.musicvenuetrust.com
info@musicvenuetrust.com

FOREWORD

A FEW WORDS FROM MUSIC VENUE TRUST

Music Venue Trust, founded in 2014, is a registered charity that seeks to preserve, secure and improve the UK's network of small to medium scale, mostly independently run, music venues. We have a long term plan to protect that live music network which includes, where necessary, taking into charitable ownership freehold properties so they can be removed from commercial pressures and leased back to passionate music professionals to continue their operation.

In the lead up to and at Venues Day 2014, held at the Southbank Centre, London on 9 December and attended by over 120 venues from across the UK, our partners at the Institute for Contemporary Music Performance conducted the first ever national research about how these venues operate, the challenges they face and the role they play.

We would like to thank Tom and the team at The Institute for their work in bringing it together, and to thank our partners at UK Music, Independent Venue Week and Southbank Centre for their support for both this report and Venues Day 2014. We'd also like to thank Arts Council England for their support for this work.

We feel this research is crucial to understanding what we can do to ensure we act together to protect, secure and improve the UK's grassroots music venues.

Music Venue Trust believes that the UK's artists and audience deserve world class music venues across the country that support local music communities and nurture and grow our outstanding talent.

This report provide an opportunity for the music industry, the cultural sector and local and national government to quickly and effectively help us achieve that aim, and we look forward to working with them to respond to its recommendations with direct action.

MARK DAVYD
CEO
MUSIC VENUE TRUST
www.musicvenuetrust.com

EXECUTIVE SUMMARY

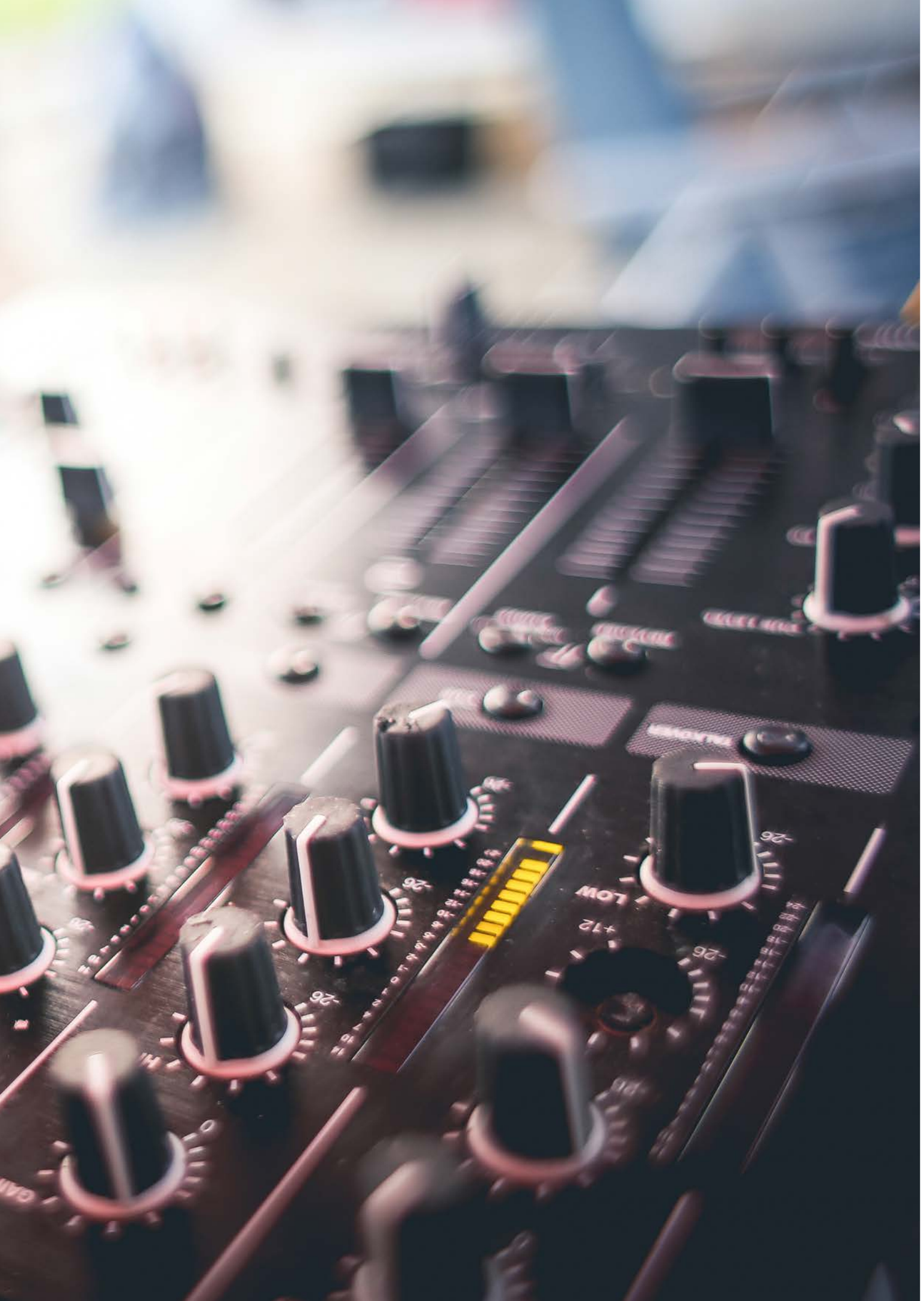
The report 'Understanding Small Music Venues' is an attempt to capture, through both qualitative and quantitative data, a sense of the current state of play of the UK's small independent music venues. This report considers specific individual feedback from venue owners, promoters and other stakeholders.

It is clear from the evidence captured that the UK's independent venues represent a diverse sector whose constituents play a vital role in the ecology of both the music industry and broader cultural sector; with positive impact on businesses, communities and economies – both local and national. The report reveals independent music venues to be operating under significant pressures, both financial and regulatory.

The report also highlights concerns about the image of such venues, indicating that further work needs to be done to shift public perception away from a rather tired pejorative of the 'toilet circuit' to a more celebratory narrative. This narrative must acknowledge and respect both the increased professionalism of the sector and the vital role such venues play in the grassroots development of live music. It is hoped that this report will lend both respectability and rigour to the debates about the future and value of such spaces, with the insights offered helping to broaden and temper such debates.

The report concludes with our recommendations for actions that will further support, underpin and value this vital part of the cultural sector. The recommendations are captured under specific headings which seek to clarify roles, responsibilities and activities, namely: activism; advocacy and support networks; improving the experience for musicians; qualitative arguments; formal representation; lobbying for review of licensing and regulation; venue identity and investment.

It is only through taking such a holistic view of the UK's small independent music venues that both the true complexity of the debates and the true cultural, economic and social value of the sector might be recognised.



CONTENTS

INTRODUCTION 10

The role of small music venues in the UK 11

Saving and safeguarding the 'Toilet Circuit': Music Venue Trust and other Initiatives 12

Venues Day 2014 13

METHODOLOGY 13

FINDINGS 14

The Survey 16

The Interviews 18

The Panel Discussions 28

SUMMARY 34

Our View 37

Acknowledgements 42

APPENDICES 44

References 46

Appendix i: Survey summaries 48

Appendix ii: Venues Day 2014 schedule 56

Appendix iii Venues Day 2014 delegate list 60

INTRODUCTION

This report presents the findings of a research project undertaken by the Institute of Contemporary Music Performance (hereafter The Institute) investigating the experiences of small music venues in the UK. The project was commissioned by the Music Venue Trust (MVT) and funded by Arts Council England (ACE) via an allocation of a grant awarded to MVT (Grant for the Arts ref. 27555752) and by The Institute.

All of the authors are interested in this debate as performers as well as teachers and researchers in higher education, and we greatly welcome the opportunity to contribute to the vital discussion around music venues in the UK.

THE ROLE OF SMALL MUSIC VENUES IN THE UK

Venues hosting live music can be found in almost every town across the United Kingdom, and range from the back rooms of independently-run pubs to the largest of corporate arenas. In this report we focus on the smaller venues that "fulfill a crucial role in providing a forum for those commercial acts too small for the chains, yet sit awkwardly between the pillars of 'commerce' and 'culture'"(Behr et al., 2014a, p.5): that is, they are usually dependent on the market for their survival but are often subsistence rather than profit-driven, and fulfill a vital role in fostering underground and emerging popular culture but are not typically supported by public funding for the arts.

It is in these venues that professional musicians typically begin their careers, developing their skills and craft before scaling up to larger venues. Furthermore, as is too often overlooked, they are also where vast numbers of amateur (in the positive sense of the word) musicians first engage in music-making, and often continue to do so throughout their lives. Beyond the musicians who play there, these small venues also play host to communities of fans, employees, volunteers, promoters and other enthusiasts. Indeed, these groups can often be the same people wearing different 'hats' as part of vibrant DIY scenes (Gordon 2012, Kirschner 1998). As Smith & Gillett (2015, p21) note, "There is life in the underground, and it is vibrant with relationships, creativities and entrepreneurship". It is important therefore to recognize these spaces both in terms of their contribution to the £789 million GVA and the 21,600 jobs attributed to UK live music (UK Music, 2014a), but also to the nation's social and cultural life. It is in terms of these roles and characteristics that we delineate 'small venues' in this report, rather than according to threshold criteria of capacity or size, although we acknowledge that at present some regulatory conditions are contingent upon venue capacity.[1]

1 The venues featured in this study range in size from less than 100 capacity to over 500, with the majority in the 100-300 range (see Appendix i.) .

SAVING AND SAFEGUARDING THE 'TOILET CIRCUIT'

MUSIC VENUE TRUST AND OTHER INITIATIVES

Behr et al. (2014a) note that small venues are highly susceptible to the vagaries of local and national policy and its application, in particular with regard to noise, and also lack the financial resources to adapt to rising property prices. These factors together make their day-to-day existence precarious, and have led to many iconic venues closing for good.

Responses to these closures have included online campaigns that in some cases have garnered high profile political support. A notable example is Bristol's The Fleece, whose petition amassed 30,000 signatures in 48 hours, and secured the support of Bristol's mayor George Ferguson and Bristol East MP Kerry McCarthy. McCarthy has also given public support to the future of the small venues circuit more generally, alongside other political figures including Mike Weatherley MP.

Advocacy groups and initiatives have also formed in recent years to celebrate small music venues and draw attention to the increasingly precarious conditions under which they operate. The Music Venue Trust (hereafter MVT), for whom we undertook this report, was established in January 2014, and acquired charitable status in December 2014. Its stated mission is as follows:

> Our immediate focus is on securing the long-term future of the iconic venues which make up the "toilet circuit", venues like Southampton Joiners, Tunbridge Wells Forum, the 100 Club, Exeter Cavern, Hull Adelphi, Manchester Band on the Wall. [...] These venues have played a crucial role in the development of British music over the last 40 years, nurturing local talent, providing a platform for artists to build their careers and develop their music and their performance skills. The Music Venue Trust has a clear 5-year plan to ensure those venues continue to play their vital role in supporting the British music success story (MVT, 2015).

Closely allied with but separate from MVT, Independent Venue Week (hereafter IVW) has been established as 'a 7 day celebration of small music venues around the UK, and a nod to the people that run them, week in, week out' (IVW, 2015). Independent Venue Week 2015 (Monday 26th January to Sunday 1st February 2015) saw 92 venues from across the UK host shows by 450 artists in awareness and celebration of the small venues that:

> [...] give artists their first experience of playing live in front of an audience and give fans somewhere to get up close to artists that one day may well be playing stadiums and festival main stages (IVW, 2015).

Both MVT and IVW have secured public funding from Arts Council England for their work, and gained official support from public and industry figures (see MVT's and IVW's websites for details of patrons, champions and supporters).

VENUES DAY 2014

MVT, in association with a number of other interested parties (see Foreword) and funded by Arts Council England, hosted Venues Day 2014 on the 9th December 2014 at the Southbank Centre in London. This was a large networking event intended to provide a forum for representatives of small music venues in the United Kingdom and other stakeholders to air and share their experiences and perspectives, and identify actions and strategies for addressing common issues. It was the first event of its kind in a sector that has no union or representative body, and drew delegates from across the country. The day included three themed discussions, interspersed with general networking, breakout sessions and other activities.

Venues Day 2014 provided a unique opportunity to capture comparative insight into the day-to-day realities of the UK's small music venues, which are often obscured amidst the gloss and spin of media and policy depictions of the 'buoyant live music industry' at large. We sought to capitalise on this opportunity, and our findings are presented in this report.

METHODOLOGY

The research followed a mixed methods approach comprising a survey conducted in the run-up to Venues Day 2014, interviews with delegates and analysis of the panel and audience discussions that took place on the day.

FINDINGS

SURVEY
INTERVIEWS
PANEL DISCUSSIONS

THE SURVEY

The survey was promoted via social media and emailed directly to venues between September and November 2014, and was tethered to the sign-up for Venues Day 2014. As such, all 109 survey respondents were subsequently registered as delegates representing their venues. The dual aims of the survey were to capture descriptive and contact data, in order to generate both an impression of the venues represented at Venues Day 2014, and a database of contacts to whom the on-going work of MVT and its associates could be communicated, and through which a more formalised network could be established.

The respondents represented venues from all four ACE regions, three of the four UK home nations (all except Northern Ireland) and spanned from Inverness in the North of Scotland to Plymouth in the South West of England. It is difficult to gauge precisely what proportion of the UK's small live music venues is represented by this sample, owing in part to considerable opaqueness in terms of how premises/ businesses identify and market themselves. For example, many pubs, restaurants and other spaces host live music of some kind, and thus might be considered live music venues in some regard. However, the extent of this activity can vary markedly, from the occasional musical event to a mainstay of the premises' identity and business model. At the same time, many premises marketed primarily as live music venues in practice have a range of revenue streams including club nights, rehearsal studios, cafes and restaurants. As discussed below, understandings of what a music venue is - and accordingly who might be considered part of the 'real' live music sector - appear to relate to cultural identity as much as to measurable criteria, and this ambiguity is a source of considerable tension. The findings from this research go some way to bringing clarity to this landscape, both in terms of mapping via the survey and by providing qualitative insight through interviews.

SURVEY FINDINGS

The survey data (see Appendix i for infographics) highlight unambiguously the richness and diversity of cultural activity occurring within small venues. In purely musical terms, a vast gamut of musical interests was catered for across the 109 venues represented. Perhaps unsurprisingly, the survey results displayed a bias towards popular genres typically featuring a guitar-bass-drums-vocals-type set up (e.g. indie, alternative rock), although it must be acknowledged that such genres are themselves internally diverse (the typology of genres provided in the questioning was inevitably reductive, as any would have been, with the option of 'other' allowing for additional genre types to be registered if desired). However, while most venues programmed music from across a range of genres with 'no boundaries', others catered more narrowly for minority tastes ('experimental music').

Beyond the core programming of musical acts, almost all venues (98.17%) hosted other forms of entertainment. These included dance (22.94%), theatre (33.03%), comedy (56.88%), DJs (66.06%) and karaoke (6.42%). Others reported hosting community group activities (this is explored in detail in the analysis of interview data). 44.04% of venues provided rehearsal space in addition to performance space.

The survey results also offered insight into the facilities and resourcing of venues. Almost half (48.62%) of the venues represented in the survey did not have their own back-line, and 34.68% had no disabled access. These findings may hint at the possibility of lack of funding for development, although it must be acknowledged that there are many other possible factors behind such statistics.

Varying degrees of stability in terms of management and tenancy were evidenced. Some venues had been established for more than 50 years (6.42%), others less than a year (3.67%). Current management ranged from 25 years to 5 weeks in post. Of the 78 respondents whose venue owners were not the freeholders of their building, 44.87% held long-term leaseholds, 3.85% held short-term leaseholds and 28.21% had renewable tenancy agreements.

The vast majority of respondents held a PRS licence (95.41%), a smaller large majority (85.32%) held a PPL licence, and 81.65% complied with the Musicians' Union Fair Play policy, illustrating their role in remunerating musicians and composers, and contributing to the wider music economy.

THE INTERVIEWS

Interview participants were sourced from the Venues Day delegates and 20 interviews were conducted; 18 at Venues Day itself and 2 subsequently by telephone. The interviews were semi-structured and targeted themes that related to the strategic objectives of the MVT, ACE, Southbank Centre and The Institute. While a degree of partiality must therefore be acknowledged, these themes are prominent within public discussion surrounding the live music sector, and within general discourse surrounding cultural spaces (see, for example, Behr et al (2014b)). Furthermore, the semi-structured interview design allowed for discussion to be inductive and participant-driven, mitigating against potential bias in data collection. All participants were given formal guarantees of anonymity and confidentiality .

Interview data were analysed using an inductive approach as outlined by Thomas (2006). This involved reading and re-reading the interview transcripts and ascribing characteristics and themes to the interview data. The data from all interviews were then collated together into themes, and considered comparatively. These are presented below.

INTERVIEW FINDINGS: CHALLENGES

A significant challenge identified among interviewees was the threat posed by property developers. Respondents from Liverpool, London and Birmingham noted huge increases in new residential developments in historically industrial areas. This was attributed by two respondents to 'incredibly relaxed planning', and specifically to amendments made in 2013 to planning legislation:

> [if] you own an office block you can [now] turn it into flats [easily]. And they've gone, "Oh great, here we go, we've finally got an answer to our dinosaur building.

Another respondent spoke of a general tendency among freeholders to 'follow the money', of which venues had little and developers a lot. He gave examples of where, insofar as he understood, landlords had served notice on venues following offers from property developers with which the venues could not hope to compete. As discussed under Cultural Value, he perceived this to be having a devastating effect on the UK's cultural landscape. Another respondent suggested that the developers appeared to have little interest in community opposition, even when expressed via a petition with thousands of signatories.

An associated challenge related to the issue of noise. As might be expected, this challenge was identified mainly among respondents whose venues were in densely populated areas. Two respondents felt that noise abatement legislation was implicitly biased in favour of residential development; within the current legislative climate, owners of newly developed residential properties 'literally next door to venue[s]' could mount complaints and 'get [the venue] closed down'. One respondent voiced their suspicion that in one well publicised case 'it sounds like there was planning on the table [...] months before [complaints were made]'.

Two respondents noted that their venues bore the brunt of noise-related complaints in their area because of the assumption that 'if there is a noise it's probably the live music venue's fault'. One respondent noted that local fast food outlets and a train station were major sources of street noise, but that complaints were inevitably addressed to their venue.

Three respondents expressed their frustration that the majority (or in one case all) of the complaints filed against them over several years could be attributed to one person. However, one respondent remarked that while their relationship with their neighbours was good, the local authority continually subjected them to noise review despite their having received no complaints, and having complied with and met the requirements set out by Environmental Health. This caused him a great deal of anxiety:

> That happened three times, and I said, "Look, it's not fair for me to have to put up with this stress," because that's what it is. I can't ever stop thinking about it, because I don't know if they're going to say to me, "Actually, yes. Noise abatement order."

Two respondents noted that taking a pre-emptive approach to noise issues by approaching neighbours directly had helped to reduce complaints. In one respondent's case this had involved 'pay[ing] for people to have double glazing - whatever it takes.' Other respondents had sought to install increased soundproofing in their venue. However, one noted that this had adversely affected its public image, in contrast to the neighbouring bars that had subsequently started programming music:

> Now everyone in the street is allowed to open their doors wide open and play music out. So for us, people walking past, we look dead because we've got all this soundproofing and then all the other places have got this loud music.

Dealing with increasing levels of competition was identified as a challenge by several respondents. While one asserted his belief that 'density of business brings business', another spoke of licensing laws having led to the availability of music being 'saturated'. This was related by some respondents to the issue of Venue Identity, discussed below. Three respondents identified a lack of communication between local venues, which one believed often resulted in direct competition that might be avoided:

> How can [we] work together and actually work [our] programmes together? "I'm having a punk night, you do an indie night" or something. It's different audiences. Constantly competing at all times doesn't work out for anyone.

A general challenge identified by respondents was diminishing audiences. This issue was related by one respondent to the recession, by another to students' lack of disposable income (discussed under Education) and by another to the apparent lack of interest in live music among the general public (discussed under Cultural Value). Respondents spoke of having difficulty sustaining their venues, and breaking even financially:

2 The study was reviewed and approved by The Institute's Research Ethics Committee. Information sheets and consent forms detailing how the data were to be used and published were presented to all participants prior to data collection.

> Nearly all of us are working flat out, trying to do the one thing that we do the best we can to make it sustainable. Obviously the money is always the biggest challenge. In two and a half years, I haven't paid myself a penny yet. I've just about survived, week to week. Especially the smaller venues are just really starting to struggle.

Several respondents identified a lack of collectivism within the sector, and expressed a desire for more mutual support mechanisms:

> I'm trying to find a way to get an idea together that links some of the existing campaigns that exist to save venues or to make it easy for venues to protect themselves.

> One of the challenges as I've discovered today is that it's really hard to build a network of people of venues in your local area, much less around the country.

> I guess [we need a] community of venues and promoters and people interested in the industry, [...] we could probably do with a bit more of a collective voice.

VENUE IDENTITY

The issue of venues' identity and ethos emerged as a prominent theme within the interviews. Respondents spoke of their efforts to convey a sense of integrity in their programming:

> We handpick our shows and make sure that the programme reflects what we want to say as a venue. I want it to be an environment where people can be inspired by music. [...] We have people that come from across the country, from Europe and even from across the Atlantic, because they've heard of what we do.

> I think we've always wanted to be more than just a music venue, we've always wanted to [...] put on culturally important activities.

Some respondents contrasted this with what they saw elsewhere within the sector. In particular, some respondents differentiated between 'real' music venues and other spaces that programmed live music. For example:

> It's a bone of contention since this new licensing, because I do think places that put on live music and music venues are two different things.

One respondent suggested that the new licensing laws had led to people 'opening new venues to exploit the city's cultural reputation, and [created] more competition', while another spoke of several pubs near his venue that 'believe programming music will help their bottom line, when in fact it is adding cost and [has] over-saturated the availability of music in the area.' Others were disparaging of the quality of musical output from newer venues:

> We've [always] tried to have a certain level of professionalism and put a show across and project everything in a certain level and standards, and I feel like I've got two venues opposite [who don't] do it to our standard.

Some respondents were frustrated that the music they offered was not always understood or appreciated, and identified a preference among audiences for well-known rather than original music:

> I think we've always offered quite a good music policy, or least I think we did, [...] but I think people are very much of the [major local nightclub type] mainstream.

> [I ask] "So you'd rather give money to a pub to put on karaoke and tribute bands than something like this?" because there's a lot of original music at this place.

> You've got a lot of pubs but most of them do cover bands so there might be seven or eight pubs every Friday and Saturday night that put on cover bands.

> It seems to be really hard to get people to come in for anything that's not well known.

This had caused one respondent to wonder whether her belief that live music was important- a central premise of Venues Day 2014 - was in fact misplaced:

> I don't know, because we all sit around saying how important live music venues are and how great it is, but it's like, "Is it? Is it important to other people?"

COMMUNITY ENGAGEMENT

All respondents reported close links with the community, and even those that described their venues as 'destination venues' with international reputations felt that they served an important function in the local community infrastructure. In around half of the respondents' venues, community engagement took the form of providing space for activities such as dance, language classes, religious societies, choirs or reading groups:

> We've always wanted to engage with the community, and not just music - we do other things as well.

Where no formal community engagement of this kind occurred, respondents saw their venues' primary role of programming musical events as being community engagement in and of itself, or described their venues in terms of being 'for want of a better word, a bit of a hub'. One respondent spoke of the impact that their venue's status had on public perceptions of their cultural and community value:

> I think [...] we were recognised more because of our charitable status and for being a valuable community resource [than for our musical activities].

One believed that community relations were crucial to venues' being accepted, and that venues should strive to 'be more physically visible in their local communities by how they contribute' in order to 'dispel this old idea of the venue as a nuisance maker, a noise maker, a source of drunk people'.

Some respondents understood the notion of community engagement in terms of cultural or artistic communities, rather than locality. One respondent spoke of the 'alternative' focus in his venue, which catered for a minority audience in a city with a very 'mainstream' culture, while another recounted how his venue 'was a

bi-product of an artist-led [community]'. One respondent spoke in plural terms of communities, noting that many different groups benefitted from their presence and activities:

> There are different communities of users. The people who come for comedy, there's the mums, there's the dancers, there's the religious folks, there's the giggers, there's the drinkers and they can exist in harmony hopefully. They may bleed into one another.

Uniquely among the interviewees, one respondent referred to social media in terms of consolidating and communicating with the venue's community:

> There's a lot [of community engagement] through social media; it's through Facebook, Twitter; we've got a huge mailing list. Because we've got these Facebook accounts and we're saying it's not just a case of promoting bands, it's asking the public what bands they'd like us to put on.

Finally, as is discussed in detail below under Education, the majority of respondents' venues maintained formal and/or informal links with educational communities.

CULTURAL VALUE

Respondents were passionate in asserting the value of live music, both in instrumentalist terms relating to its contribution to the local and national economy, and in terms of its intrinsic cultural value. Two respondents spoke of the unique role their venues played in nurturing local musical talent:

> There's nowhere else that would give new bands or local talent the chance other than us. We're the only venue I really know. We are the lifeblood of up-and-coming producers, DJs and musicians.

While others spoke more in terms of the audience perspective, noting that their venues offered the possibility of new cultural experiences:

> If you show up at 7:30 tonight you can walk in, have a drink, see three bands and one of them might change your life. We often have people who go to the loo, come back through the wrong door and find themselves in a music venue and go, "This is quite good, I'm going to stay for a while."

Another aspect of venues' cultural value related to heritage. One respondent believed that many venues should be awarded blue heritage plaques to illustrate their cultural significance, and spoke at length of the cultural history he felt was at risk in the current climate. He gave the example of one iconic London venue that '[was] going to go, and also a rehearsal room behind it, and also loads of music shops. There's a huge history in that street', and of another lesser-known venue that was due to 'get torn down, and it's only the place where they made [a seminal Britpop music video], so that's another bit of history gone'. He commented on the short-sightedness of developers seeking to 'cash in' on East London's cultural reputation, only to raze its cultural landscape in the process:

> I find it mystifying that it's so attractive to build new flats in an area that is so culturally rich to the detriment of all that cultural richness, until what you have is a Central London location with lots and lots and lots of flats and lots of Pret a Mangers and lots of chain shops.

YOUTH ENGAGEMENT

Almost all respondents reported positive engagements with young people. Often this involved formal collaborations with schools, colleges and universities, which are covered separately below. Beyond this, many respondents' venues were involved with nationwide or regional initiatives to promote youth engagement in the sector such as the Big Music Project, that gave young people the opportunity to learn about aspects of the industry such as sound engineering, ticketing and promotion. In addition, many made their space available to young people for recording, rehearsal, ping-pong and other activities during the daytime.

Around half of respondents' venues catered to under-18s in their programming, whether through 14+ shows, all-ages events during the daytime or family-oriented events. Respondents reported having musicians as young as 12 perform at their venues. One respondent struggled to find ways to make under-18 events financially viable:

> I'd like to do more stuff with young people. It's how we make money if they're not drinking, that's what I need to work out.

Another noted that when his venue's official capacity was reached at under-18 events it was 'two-thirds empty' because of the absence of his typical audience's 'middle-aged spread'. Another respondent spoke of the time required to organise all-ages events, which limited the extent to which she could do so.

Responses regarding the issue of volunteering were mixed. Several respondents reported high levels of requests for volunteering and internship opportunities:

> I have people contact me all the time about trying to do unpaid volunteering maybe shadowing, things like that. We have so many people approaching us to volunteer that we don't need to advertise for it. People are constantly asking if they can come and flyer or take photographs, or stuff for guest list or for free entry, and yes there's quite a lot of that.

Levels of volunteering ranged from '4 to 5 [working] at any one time', to occasional ad hoc help 'pulling down shutters, collecting glasses, that sort of thing.' One respondent reported having had 'very successful relationships with people that have come to work for me in a work experience mode who have then gone onto have a career in the music industry.' However, others spoke of the difficulty of using volunteers because of the time it took to organise and the fact that sometimes 'they [don't] show up.' Two respondents were against volunteering on the principle that work should be paid:

> We pay them. If we have someone doing something, if we want someone to come in and do something boring we just pay them, we're not going to pretend to them that they're going to get to work at the venue if they come in and do something boring. If we want someone to do something boring we just pay them to do it.

One respondent's venue employed an apprentice, which was in part funded by the Creative Employment programme, facilitated by UK Music, under their apprenticeship scheme.

EDUCATION

The majority of respondents reported that their venues maintained collaborative relationships with universities, schools and colleges, although this ranged from ad hoc and informal engagement to formalized knowledge share and project work. One respondent felt that this was an area of activity that should increase within the sector, but was cautious about its strain on resources:

> My point of view is that venues should do more of it if they can. As long as it doesn't represent the kind of drain on their finances that stops them being able to operate, I think they should absolutely do more of it.

Two respondents had been asked by local universities to contribute their expertise through lecturing and consultancy. Others reported offering formal work placement opportunities to event management students from local, and in one case international, universities. Others spoke of their venue being used as a performance space for end of year shows and assessments for local colleges. The most common area of collaboration however was sound engineering and technology. Two respondents spoke of local colleges wanting to take advantage of the venues' high-specification technology, and in particular the soundboards. For one respondent's venue, this was a mutually beneficial arrangement as it allowed them to develop a roster of sound engineers from the students they trained. Another respondent's venue collaborated mainly with art and design students, who worked with the venue to design their flyers and posters.

In addition to formal projects, some respondents reported high levels of student-driven collaboration. This could take the form of student society fundraisers, or students contacting the venue to ask for advice on their projects:

> The university's burlesque society has their home with us, so we have performance art as well as music. The students just come and get in touch with me, and go, "We've got an assignment to do."

> We get students who are doing sound tech courses and stuff and they come in [...] to get a better idea of what it is actually like in a working environment rather than just sitting in a classroom learning about it.

Other respondents spoke of how reliant they were on student audiences:

> The residents of XXXX tend not to come, but the students do. I think maybe we're a bit too underground for the local 'yuppies'.

But three respondents suggested that student audiences had sloped off recently. One attributed this to students' lack of disposable income because of student fee increases, while another had sought help from the university to encourage students to use their venue:

> That's been quite difficult actually. We've struggled to get people from the universities to come to events, even music students. We're trying to tackle [that] at the moment with the help of the lecturers, to get more people to actually come.

In contrast however, one respondent's venue had stopped working with universities because of students' attitudes towards its staff:

> I gave them a really good night of the week, they turned up, all the students were pretty rude to our sound techs and didn't bother turning up to the sound check and then complained about their sound when they suddenly bring on a brass section without any warning. Then none of the students actually watched each other's bands, they just played and then went outside.

PRS AND PPL

Respondents demonstrated a lack of clarity around the various roles of PRS for Music (licensing for live music performance), PRS Foundation (the grant giving charity that aims to support new music) and PPL (licensing for pre-recorded music). That lack of clarity results in a negative impression among many respondents towards one organisation as a result of the perceptions of the activity of another - that a failure to support venues by PRS Foundation is interpreted as a failure to support venues by PRS for Music and vice versa with licensing concerns. For the purposes of this report we have grouped the attitudes towards PRS for Music and PRS Foundation into one heading. We recommend that both organisations should address this confusion by defining their activities and responsibilities in a manner that offers clarity to venues. While some respondents reported straightforward negotiations with the Performing Rights Society for Music (PRS), the general impression was one of strained relationships:

> We don't have PRS funding at the moment. [...] We were turned down for out last application and we weren't told why.

> Well PRS, I've been contacting them over the eight years, and they've been giving me the run around constantly, and eventually I said I was going to start a petition online to get them to realise that there is activity outside London.

> PRS are causing us a little bit of a nightmare. They were initially trying to charge me £1,000 a year, which would put us out of business at this point. [My boss] phones them up every now and then and goes, "you're too expensive".

In particular, there was a perception among some respondents that PRS were obscurantist about their licensing requirements:

> I've had telephone conversations with them. [...] The guy on the phone said to me, 'You have to pay if you play music'." And I was like, "No, that's not the law. The law says I have to pay you if I play music for which you have been authorised to collect the royalties. [...] We play cutting-edge music. As far as I'm concerned, I don't play any commercial music."

One respondent suggested that PRS was doing more to damage the live music sector than it was to empower musicians:

> I wonder if an organisation like that wouldn't be better off giving small venue owners, who are passionate and don't take much of a salary [a break]. I wonder if that £15,000 isn't better well spent on actually just letting the venue operate. [...] That money would be better spent maintaining those levels of venue, to ensure that the bands can then come and then play and then drive a source of income, because it's all well and good having PRS but if you haven't got the venue PRS is practically pointless.

The majority of our respondents were not involved in negotiating their venue's relationship with Phonographic Performance Limited (PPL), but those who were appeared to find the relationship less problematic because of the lower fees involved, and because of PPL's active support of events.

RELATIONSHIPS WITH THE LOCAL AUTHORITY AND PUBLIC SERVICES

Most respondents reported having positive relationships with the police. Those whose venues were in large cities reported working closely with the police to anticipate, identify and monitor criminal behaviour (such as through Pub Watch), and in the case of one respondent's venue the police were regular customers off-duty. Other respondents depicted similar friendly and informal relationships:

> [We have] a lot of contact with our local bobby, we even had his personal mobile number. And they used to send policemen in plain clothes, but they started to like the music. The police actually had a Christmas do in one of our little pop-up venues.

One respondent reported that the police had supported her venue in their applications for Temporary Events (TENS) and other licensing, and had been 'fantastic' in helping them combat card skimming.

Across the respondents, relationships with the local council were more mixed. One respondent described her local council as 'very, very conservative', and accordingly she had sought to keep a distance 'because I don't want to politicise our venue'. Another spoke of having to actively 'carve our relationship out. It wasn't easy'. They had sought to do so in order to avoid what they saw as the typically negative relationship between venues and the local authority:

> I think what we learnt from was probably most venues don't have a good relationship. We had to have a problem in order to strike a relationship.

One respondent reported that 'elements of the local authority have been a nightmare'. In particular, the Environmental Health Officer had misinformed him of the local situation with regard to historic noise complaints. Another complained that the local MP had not responded to any of their emails. Others felt that the local authority was too supportive of developers. On the other hand, one respondent noted that local councillors had been very supportive of their cause in opposing developments, and were 'against the aggressive nature of the developers' plans', but acknowledged that 'they're kind of tied; they can only do so much'. Another reported that the local councillors had helped them in lobbying activities.

Some respondents described highly positive, reciprocal relationships with the local council. For example, one respondent's venue provided the PA for the town's Christmas lights ceremony, and other street parties, and in return benefitted from the advice of the local business manager. Another respondent recounted that the local authority paid for the marquee at the town festival, while their venue booked the bands and provided the PA system.

FUNDING

Around half of the interviewees said they received no public funding and relied entirely on commercial income. Among those that did, this ranged from contributions towards standalone events, to participation in Lottery-funded initiatives and schemes (such as the Big Music Project), to funding for BBC events, to direct funding from ACE (Grants for the Arts). In one instance of the latter, the respondent noted that it had enabled their venue to undertake a project that would have been unviable otherwise:

> It's been very important for the programme that we've just put on because we would never have been able to do it otherwise.

Other respondents felt that their venues had benefitted indirectly from Arts Council funding by working with other institutions that were 'more plugged in to that kind of thing.' Two respondents however were frustrated that their applications for funding had been repeatedly rejected, despite (in one case) their venue winning some significant accolades:

> Not a cent. With XXXX, we won 'best venue in XXXX' [two years running], we won the 'best venue in the country' through XXXX, but no one ever saw fit to give us a penny.

PANEL DISCUSSIONS

A final data set was comprised of transcriptions of three panel discussions that took place on Venues Day 2014. Panel participants were selected purposively by MVT on the basis of their experience and expertise regarding the themes under focus, and to reflect the range of stakeholders within each theme. Each panel discussion was opened up to delegates for questions, insight and discussion.

The panel discussions based around three broad themes, as follows:

MAKING GOOD VENUES GREAT

"What makes a good venue into a great venue? What could venues do more of to increase their value to music fans and to musicians? How do we reach new audiences and talk to the industry better?"

NOISE VS. NUISANCE

"What are the factors that can make your music noise a nuisance and how can you manage it? Do we need an Agent of Change principle?"

MOVE ON UP: WHAT'S NEXT?

"What have we learned and what can key stakeholders do about it?"

The panels were mainly comprised of industry stakeholders ranging from venue owners, to musicians, to representatives from the Musicians Union and Attitude is Everything, a disabled access advocacy group, to MPs supportive of live music. Panels also included experts from legal and environmental backgrounds, some of whom were issued with bells to interject where discussion veered into legally or scientifically inaccurate territory (see appendix ii for full panel profiles). In all panel discussions, each panellist was given an opportunity to introduce her/himself and her/his angle on the topic at hand. Some panellists read from prepared speeches, while others gave more impromptu perspectives. Comments and questions were then invited from audience members and responded to in the round.

Panelists and audience members had been cautioned by the Chair of the first panel that due to time constraints these discussions were not meant to focus on details of specific experiences of individual venues and how these had been dealt with, but rather to offer a platform for general discussion and sharing. This framing could be part of why the overwhelming focus was on general challenges rather than on specific steps undertaken to address them. While the one-to-one interviews we undertook suggested that the challenges faced and steps taken by venues can often be quite locale-specific, it is hoped that sharing individual experiences through this report will enrich the discussions that took place at Venues Day 2014, and promote a better understanding of the sector as a whole.

Despite calls from the hosts to 'try and give things a positive spin and avoid a 'bitchfest'', and another panellist claiming Venues Day 2014 to be 'a celebration not a wake', it became clear that many venue owners and other stakeholders felt it was vital and constructive to share their concerns and struggles in this large-group setting, even if specific, focused solutions were not always identified or explored in great detail. As will be discussed below, the identification of shared challenges faced by venues in these panel discussions directly informed the formation of the Music Venues Alliance in the months immediately following Venues Day 2014, and also informs our recommendations.

The themes emerging from the panel discussions largely coincided with those identified in our analysis of the interviews, and are examined below.

CHALLENGES

As in the interviews, panellists and audience members identified a range of challenges faced by music venues. Audience perspectives during Panel One: 'Making Good Venues Great' largely focused on issues that impede venues from being as all stakeholders would like them to be. Financial pressures were prominent here, summed up by one participant's statement that '[those working within the sector] want to provide good venues, but it is all about money.' Frequent mention was made of the need for 'investment' in venues, whether this be from successful promoters, state subsidy or other methods. Venue owners in the audience referred to promoters not being sufficiently supportive by 'paying their way', or by booking successful bands in the locales in which they had 'cut their teeth'. It was also mentioned that many managers would not allow their musicians to play 'unless they are promoting something'. One participant identified what he saw as the crux of the problem: 'venues need investment from somewhere, and it can't just come from guys who own the venue'. Another audience member weighed funding options, asking 'why shouldn't they [publishers, record companies, festivals] be asked to put their hands in their pockets?' while admitting that it was a 'big ask of any government to put their hands in their pockets [if other financially successful stakeholders won't]'.

Several audience members mentioned the use of club nights to subsidise live music venues. Through a show of hands, this was demonstrated to be a significant survival tactic used by almost all of the venues represented. The pitfalls of this approach were explored as well. Many pointed to the lack of actual return after costs, while others mentioned that club nights further associate venues with late night 'debauchery', which can then lead to noise complaints or negative attitudes from neighbours, the council and police. Jehnny Beth (Panel One) offered a musician's perspective, stating that 'for artists it is not nice to have to play early and evacuate to prepare for a club night', which negatively impacted upon the atmosphere surrounding their performance. Others pointed to the financial downturn and the rise of VAT as reasons why punters were less willing to come out and/or purchase the tickets and drinks that had at one time made venues financially viable.

Audience members expressed their personal weariness with the need to constantly invest their own money and take significant financial risks:

> We have to figure out how this is going to work so that as a business owner I am allowed to make money.

One participant suggested that 'communities [thought] that the venue[s] will always be there despite the precarious situation most are in', and argued that it was essential to make this precariousness explicit to those communities in order to generate support and awareness. Others

identified ongoing noise and nuisance complaints as having a major impact on their ability to plan and grow their businesses. The financial challenges posed by handling noise problems emerged as a significant focus of the second panel, 'Noise vs. Nuisance'. In one instance, a single complainant had led to a venue owner having to spend £10,000 in the last three years. Another participant indicated that she had been unable to develop her venue in positive ways due to having to focus on the noise problems it was facing:

> Each one of those authorities are getting paid to do their job, whereas I'm not getting paid to do mine. I'm getting bogged down. The whole process just starts again. I'm absolutely consumed with work and investigation and trying to put in systems to cover my back, so I haven't been able to push the venue forward for the past 9 months.

As with several of the interviews, the panel discussion on noise centred around the perceived lack of training among Environmental Health Officers, new development taking precedent over existing venues, instances where one or a few complainants can succeed in closing a venue, and the perceived lack of awareness of the cultural value of live music among Local Authorities and licencing, The panel discussion and ensuing audience insights led to direct calls for a body to clearly articulate the cultural contribution of venues to their communities, and across the UK more broadly. One participant summed up this theme:

> This seems to be a category error—that what's being dealt with is a pejorative attitude toward live music, towards the type of people who might frequent these venues. It's [often] 18-30 year olds, there's drink involved, it's dangerous. Actually a lot of what is being addressed today through environmental heath, through noise abatement, through sound meters, is actually only a part of the picture, which is [also] about a cultural attitude toward making music and making the arts.

Identifying and moving beyond this category error prompted another audience member to articulate what they saw as the purpose of music and venues, and the potential loss to communities, which, as many interview participants referenced, are becoming increasingly homogenised in their infrastructural and cultural offerings:

> If you can't have noise in the city centre, are we supposed to do this outside the Nike outlet store 4 miles outside of town? It's intrinsic to the nature of cities that we do music in the city centre. If you make music, people will hear it. That's why you did it and that's why people like it.

Another participant offered more details on the situation faced by her own venue in London, which was facing a noise abatement order to close its garden at 9pm because of neighbour complaints:

> The money I used to make from selling food in my garden used to subsidise the venue. Council officers do not take on board that we employ 48 people and have been there 60 years. Adele played there when she was 16 and Bob Dylan played there in the '60's. We are up against it and they don't care. There won't be anything [of cultural value] left in central London.

PROPOSED NEXT STEPS

Proposals for next steps were identified in the final panel discussion which was dedicated specifically this task, but were also teased out during the earlier sessions. We have grouped these into three categories:

IMPROVING VENUES

Jehnny Beth of Savages offered simple, common sense suggestions for making a venue better for musicians, which arose from a poll she conducted with her colleagues. These were developed through discussion on Venues Day, and included:

- Keeping 'good customer service is at the core of everything'
- Ensuring that promoters, engineers and staff are on time, available, knowledgeable
- Assisting band in loading in and out
- Double-checking that sound systems and cables work and microphones are clean
- Providing safe places to store equipment and a comfortable backstage area
- Considering musicians' perspectives on venue sponsorship ('not everyone will want to play in front of Redbull sign')
- Cultivating a pro-musician 'mind set', through (for example) signs asking audiences to stay quiet and respect music; bar staff remaining quiet at the till; treating every artist the same way

Suzanne Bull MBE of Attitude is Everything offered her organisation's services to assist venues in making their venues more accessible to disabled fans who represent '£212 billion in spending power'. Accessibility, she explained, is not necessarily about building wheelchair ramps or spending money; venues can take certain basis steps to ensure they attract the widest audience possible. Those she mentioned were:

- Ensuring clear accessibility information online and in advance
- Providing free tickets for personal assistants
- Creating viewing areas where disabled people can be safe

REAPPRAISING NOISE AND NUISANCE

Several specific recommendations arose from the discussions surrounding noise and nuisance. Many of these were linked to the need to create a representative body for venues:

- Devising a procedure for complaining about complainants (the audience erupted in applause when this point was mentioned)
- Promoting recognition that a successful business will have noise relating to access and egress
- Lobbying for new noise legislation, whereby 'the new has to accommodate the existing', and the responsibility for modification and soundproofing rests with the developers of new buildings in an area (akin to the Agent of Change principle)

Shifting the conversation toward cultural value. Recommendations were made regarding how to change negative perceptions of music venues and assert their cultural value. These included:

- Promoting understanding among licensing officers that '[venue owners

are] involved in a culture-making effort, not a money-making effort'
- Displaying badges/plaques recognising venues' cultural heritage and value
- Seeking tax breaks for venues making less than a threshold amount of money

Further proposed next steps included venue-specific actions, as well as the broader establishing of a representative body dedicated to supporting venues – the Music Venues Alliance.

SUMMARY

SUMMARY
OUR VIEW
ACKNOWLEDGEMENTS

SUMMARY

Depicted across each of the three data sets (survey, interviews, panel discussions) is a culturally rich grassroots sector upon which a diverse range of stakeholders depend for employment, training, social interaction, community engagement and cultural sustenance. Yet challenges relating to regulation, licensing, public perception and the rapidly changing urban environment are threatening their survival, with demoralizing effect. However, the collective and individual voices presented in this report indicate that there is will, know-how and ingenuity to take positive steps to secure the future of small venues.

OUR VIEW

We wish at this point to restate our position in relation to the MVT. As a research partner, we were tasked with investigating and documenting the experiences of small music venues in relation to the strategic objectives of the Music Venue Trust and other partners. Just as the participants' responses presented here represent their own perspectives only, so our analyses here are our own and not those of the MVT or ACE. That said, our involvement in this project is not disinterested, and ultimately stems from our advocacy and support for the work of MVT, IVW and others seeking to strengthen and safeguard the grassroots of the live music sector. Accordingly, as an interested party we offer our suggestions on the basis of our findings for how the sector and its supporters might move forward from the present situation and secure a sustainable future for live music in the UK.

ACTIVISM

Notwithstanding the mixed reception of the Live Music Act 2012, and regardless of the impact of the Act itself, its existence is surely testament to the fact that focused activism can effect actual, tangible change in policy. That said, passivism and even apathy within the grassroots of the live music sector were perceived by three of our interviewees, and have been noted in a press editorial (Beth, 2015). This stands in contrast to perceptions of the situation in Europe. We understand of course that the day-to-day pressures of survival in today's economic and regulatory climate can suppress the impetus - and indeed the time available - for activism, but nonetheless believe that a more active spirit of resistance will help achieve a critical mass within the grassroots that would improve the lot for all. On a positive note, the traction and support achieved by MVT in its short existence (culminating in a 300-plus people display of collectivism at Venues Day) and by other initiatives (notably IVW, LMX and others) belie these perceptions of apathy and hint at a politically energized sector. This energy needs to be harnessed.

ADVOCACY AND SUPPORT NETWORKS

Support within the political, cultural and community arenas are crucial to furthering the cause of small music venues. There are notable examples of this from individuals, but more are needed. Furthermore, we believe that prominent advocacy from institutions and organisations - both within and outside the music industry - will lend considerable visibility to the role of small music venues in local, sector and global economies, and in social and cultural life. Other potential advantages are resource share, funding, representation and consultancy.

As was evidenced in the interview data, links with the education sector can form the basis of robust, reciprocal ecologies. From our own perspective as an industry-focused music education provider, we recognize the network of small venues as a central aspect of our students' extra-curricular education, as well as an essential resource enabling us to embed their formal education within a real-world context; we utilize our links with venues to host performances, assessments and showcases, and to provide event management opportunities. We also draw upon expertise, employing venue staff as visiting or guest lecturers. In return, venues benefit from revenue from venue hire, student footfall, paid consultancy opportunities, student skills and labour,

and exposure. A visible evidence base (in the form of case studies, reports, research and testimonials) attesting to the positive outcomes of these kinds of links may lead to increased engagement. Research is currently being undertaken at Birmingham City University (Long et al., forthcoming) into the role of students in the local popular music economy, and our on-going research focuses on these links from a skills perspective. More is needed.

IMPROVING THE EXPERIENCE FOR MUSICIANS

Anecdotal reports from musician delegates at Venues Day depicted loveless relationships between bands and venues, in contrast to their experiences of performing outside the UK, where musicians were felt to be valued and respected. Our (the authors') recent experiences of gigging and touring chime with this perspective. It is notable that the majority of the suggestions made above (under Proposed Next Steps) do not (necessarily) require any direct financial investment, and thus represent resource-light ways to change perceptions of the UK's small venue circuit, but need to happen wholesale if they are to be noticed. Other measures, such as providing modest refreshments and logistical support, would also help to bring the UK touring experience into line with better continental European ones. The Music Venues Alliance, UK Music and other representative/stakeholder bodies might consider commissioning a task force to undertake a consultation exercise, comparing approaches in Europe and the UK and identifying best practice.

FORMAL REPRESENTATION

A lack of collective representation was highlighted during Venues Day, and indeed was a key motivation for MVT's formation. Work should continue in this area to establish the necessary structures for an integrated, communicative and informed sector. Venues Day illustrated the progress already made in this regard by MVT, alongside other initiatives such as IVW, and has led directly to the formation of the Music Venues Alliance. Again, continental European equivalents (such as Fedurock in France) might provide models for how (or how not) to take this further.

LOBBYING FOR REVIEW OF LICENSING AND REGULATION

The imbalances and ambiguities of legislation, regulation and licensing were seen in these findings to exert substantial pressure on small music venues, in some cases threatening their survival. In many cases legislation appears to be balanced in favour of new building developments, that are widely perceived as cultural vandalism. A review of such legislation is urgently needed and should be lobbied for. International cases where the 'Agent of Change' principle (whereby the instigators of new developments must bear the responsibility of addressing noise issues from existing venues) have been offered as precedents for its implementation in the UK. These should, in our view, be more widely publicised.

In their 2014 Public Policy Recommendations for the sustainable growth of the UK music industry, UK Music call for a strengthening of the copyright framework to safeguard the earnings of songwriters and musicians (2014b). While we support this in broad terms, we feel the discussion surrounding intellectual property needs to give space to concerns expressed in this study that the current licensing strategy in respect of live music is potentially debilitating to the grassroots venue circuit; licensing risks being counterproductive if it stifles the working environments of the very musicians whose earnings it seeks to protect. UK Music's assertion that 'innovative licensing can create diversity' (2014b) is salient here; radical innovation in terms of how music is licensed is needed to account for and protect the diverse and interdependent ecosystem of the music industry. Relieving the financial burden placed on a grassroots circuit whose survival is at risk should, in our view, be a priority within this.

QUALITATIVE ARGUMENTS

Policy and lobbying documents arguing for the value of live music tend to be couched in terms of economic growth and export potential. Within this rhetorical climate, the grassroots venue is seen entirely in its role as an incubator of talent for future economic potential. These are important and persuasive arguments, but they risk reinforcing a value framework that equates cultural value with economic contribution, and which glosses over the local ecologies that cultural spaces sustain and the contribution they make to the UK's cultural life. We believe that accompanying arguments are needed that present venues as intrinsically valuable spaces. A key aspect of this is recognising that a great deal of the music that passes through the small venues circuit is not made in pursuit of mainstream commercial success - and is unlikely ever to achieve it - but is performed for its own sake, and for the enjoyment of the audiences it attracts. The value for such music cannot and should not be rationalised in economic terms, but in terms of its contribution to a rich, diverse cultural landscape that caters for minority interests. As has been noted elsewhere, articulating the intrinsic value (as opposed to instrumentalist value) of cultural experiences is challenging, not least because of a lack of suitable ways of measuring it, and can often descend into the 'language of the ineffable' (Behr et al., 2014b). But this ineffability is arguably at the core of cultural value, which is resistant to rational explanation and is felt instinctively. Arguments for the intrinsic value of live popular music should therefore resist pressure to explain why it is valuable; instead they should focus on highlighting the experiences of audiences and musicians that attest to its being self-evidently valuable, even if that value is hard to put into words. Case studies, research reports, testimonials and other forms of publicity will help here; this is an area where the live music sector, the public and academia can work together to raise awareness.

VENUE IDENTITY

Many of the issues highlighted in both the panel discussions and the interviews were related to how venues are perceived by local communities and by society at large, and in particular to a sense that the cultural role and significance of music venues are not sufficiently acknowledged. Where the term 'arts centre' evokes impressions of community engagement, cultural value and gentility, 'music venue' carries associations of anti-social behaviour, noise and nuisance. Yet as this report amply evidences, music venues are hubs that respond to the needs of local communities, providing programmes of cultural events and space for community activities. We feel that the cultural and social role played by music venues needs to be better publicised, to effect a shift in perception

away from local nuisance to community asset. In an age of television programming where allotment gardening, highway policing and choral singing all form the bases of television series, is there not space for a documentary series focussing on the day-to-day existence of a music venue?

Other questions relating to venue identity are less straightforward. For example, how can music venues achieve a better public image in mainstream society without compromising their (in many cases) countercultural aesthetic? Venues should not be expected to adopt an art centre aesthetic in order to be valued in the same way as arts centres; this could risk their unique character being destroyed, bringing about their cultural demise by the back door. Responding to this issue will require the striking of a delicate balance, involving compromise but not capitulation.

Balance and compromise are also needed in responding to the question of branding. Jehnny Beth's vignette about musicians performing 'in front of a Red Bull sign' highlights that popular music has an extremely complex relationship with consumer culture; its infrastructure and artists are dependent on commerce for survival, yet the overt presence of big business can feel exploitative and can erode the sense of authenticity that motivates musicians, engages audiences and sustains scenes. Branding and sponsorship undoubtedly provide opportunities and support for small venues, but care must be taken that the unique identities of venues, and the artistic output of the musicians who perform there, are not compromised.

The Live Music Act 2012 has been hailed as legislation that will strengthen and invigorate the grassroots of the music industry, yet voices in this report and elsewhere suggest that it has in some cases dissipated audiences (and thus trade), given rise to amateurism and ultimately lowered the aggregate quality of live music provision. Perhaps the most difficult aspect of venue identity therefore relates to how venues can differentiate themselves from other spaces that programme live music. As our survey responses indicate, many spaces that present themselves primarily as music venues also operate as (for example) pubs, cafes and restaurants, and are thus no different in legal terms from those they seek to differentiate themselves from. Differentiation must therefore be based on criteria of quality and identity. Factors that were seen to set good music venues apart from bad ones were the emphasis placed on the quality of the musical experience, the cultural identity of the venue, the professionalism of the staff and its treatment of customers. It would seem essential therefore that in going forward, the Music Venues Alliance should formalise a set of benchmark criteria against which membership applications would be assessed. This would ensure a consistency of ethos, values and mission among its members, which its proposed kite mark would come to signify. It could also form the basis of 'good standing' expectations within the Alliance, and inform the review of funding applications. The suggestions made during Venues Day (summarised in the bullet points above under Proposed Next Steps) provide a starting point for the development of such criteria.

INVESTMENT

Reports outlining the contribution of music, and live music specifically, to the UK economy (e.g. UK Music 2014a) illustrate that our music industry is a vital asset that has weathered the economic downturn better than almost any other industry. Yet this triumphalism glosses over the far less encouraging picture of a grassroots in crisis. Focus thus far has been given to strengthening the intellectual property framework to ensure revenue from each commercial asset (UK Music 2014a; 2014b), but little formal consideration has been given to the live performance infrastructure that this report suggests is almost running on empty. If, as is frequently asserted, small venues play an essential role in the development of globally successful artists, and thus in our global export economy, then the business logic for the music industry investing in them is clear. Sustainable models for channeling investment from the upper echelons of the music industry into the grassroots circuit should be devised and implemented without delay.

Justification for public funding can also be made on the basis of venues' cultural and social roles, as discussed above. Highlighting both the level of venues' community engagement and their often perilous financial situations should provoke the state to intervene and invest. High profile advocates, as discussed earlier, would surely help in this regard. This is particularly timely given that celebrity advocacy is currently buoying other potentially conflicting proposals for cultural funding. Indeed, considered against the long-standing level of material dilapidation across the UK's small music venues, and the potential improvement that relatively modest levels of investment could bring about, proposals such as those made recently by Sir Simon Rattle for a new £200 million orchestral concert hall in London can seem alarmingly misplaced. This has nothing to do with the high/low culture debate and everything to do with the distribution of already scant arts funding. While the UK would surely benefit economically and culturally from such a project, at this point in time investing such a huge sum of money on a single, localised project in the country's wealthiest and best-resourced region, when so many cherished nationwide cultural spaces are in a state of disrepair, is surely untenable. To sustain UK music economically, culturally and socially, investment must be driven towards the grassroots.

TOM PARKINSON
MARK HUNTER
KIMBERLY CAMPANELLO
MIKE DINES
GARETH DYLAN SMITH
Institute of Contemporary Music Performance

ACKNOWLEDGEMENTS

We would like to thank all of the participants of this study for their time and insight. Your contributions to the discussion surrounding the future of the UK's small venues are vital in illuminating the challenges faced by the sector, and the dedication of those who work within it.

APPENDICES

REFERENCES
APPENDIX I
APPENDIX II
APPENDIX III

REFERENCES

Behr, A., Brennan, M. and Cloonan, M. (2014a)
The cultural value of live music from the pub to the stadium: Getting beyond the numbers.
University of Edinburgh and University of Glasgow.

Behr, A., Brennan, M. and Cloonan, M. (2014b)
Cultural value and cultural policy: some evidence from the world of live music. *International Journal of Cultural Policy,* DOI: 10.1080/10286632.2014.987668

Beth, J. (2014, December 18)
Show us the money: how the music industry can save the UK's small venues. *The Guardian*

Gordon, A. (2012)
Building recording studios while bradford burned: DIY Punk ethics in a field of force. In Z. Furness (Ed.). ***Punkademics: The Basement Show in the Ivory Tower,*** New York, NY: Minor Compositions, 104–124.

Smith, G.D. and Gillet, A. (2015)
Creativities, Innovation and Networks in Garage Punk Rock: A Case Study of the Eruptörs.
Artivate: A Journal of Entrepreneurship in the Arts 4 (1), 9–24.

Thomas, D.R (2006)
A general inductive approach for analyzing qualitative evaluation data.
American Journal of Evaluation, 27 (2), 237-246.

UK Music (2014a)
Measuring music.

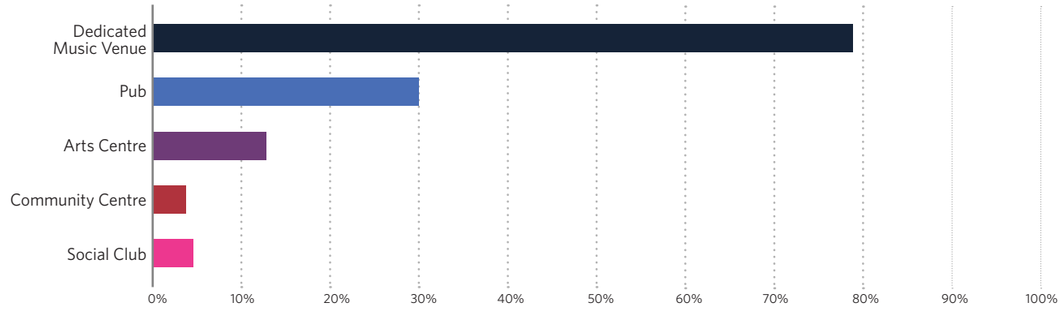
UK Music (2014b)
Public policy recommendations for the sustainable growth of the UK music industry.

UK Music (2013)
The Rocktober report. The live music act: One year on.

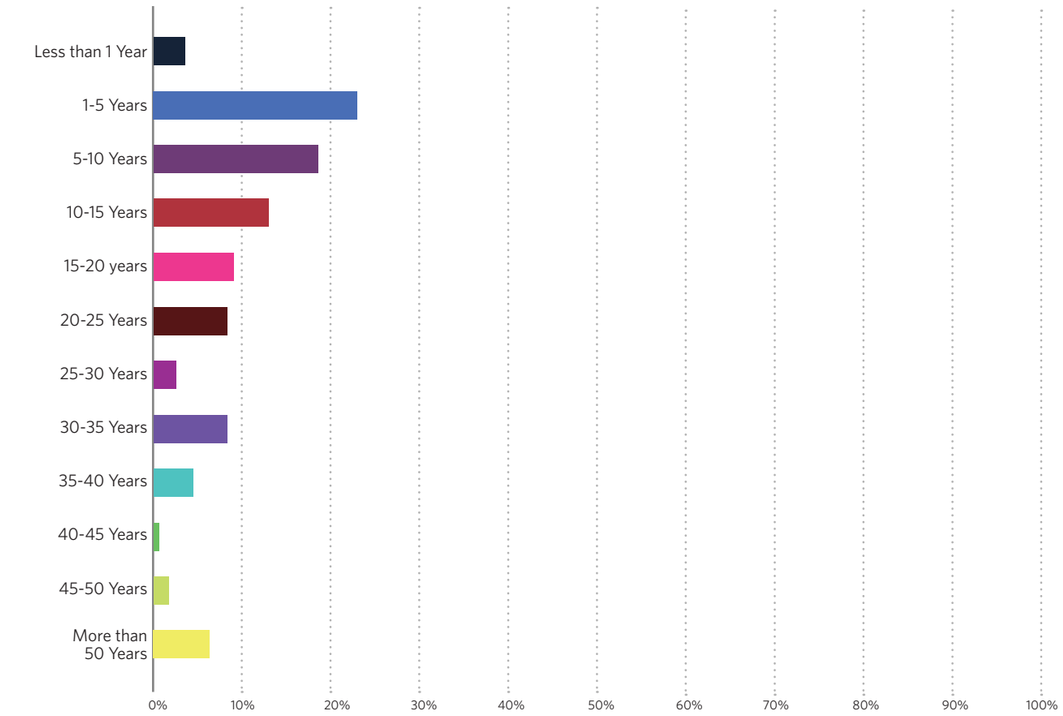
APPENDIX I
SURVEY SUMMARIES

VENUE CHARACTERISTICS

Venue type

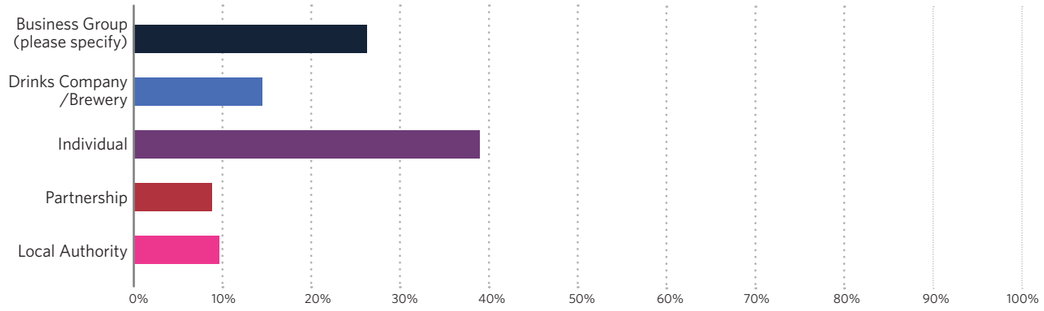


How long have you been operating as a live music venue?

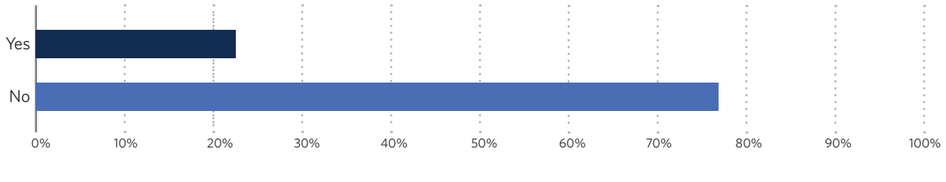


VENUE CHARACTERISTICS

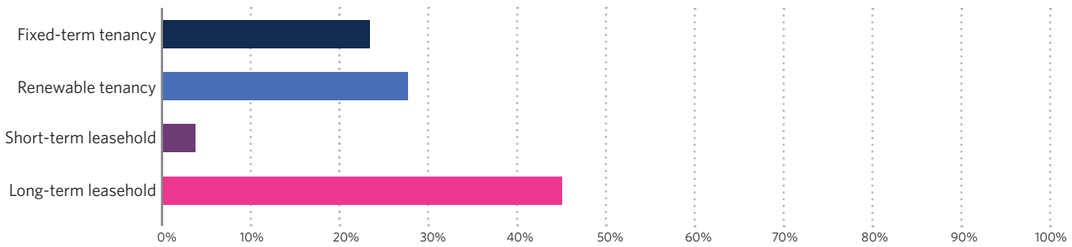
Who owns the venue?



Is your venue tied to a contract with a brewery?

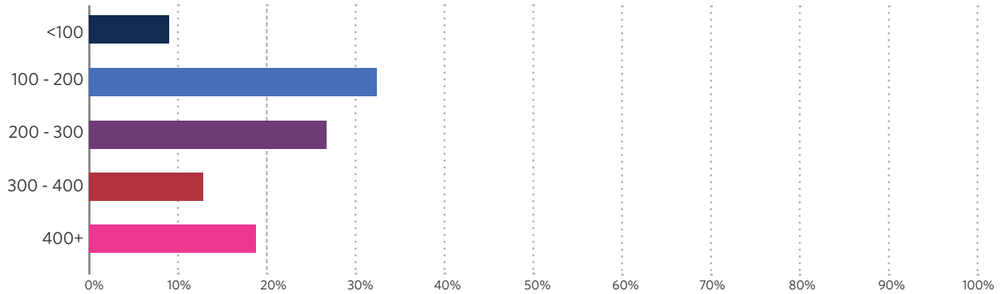


If you lease the building, what sort of tenancy agreement do you have? (78 responses)

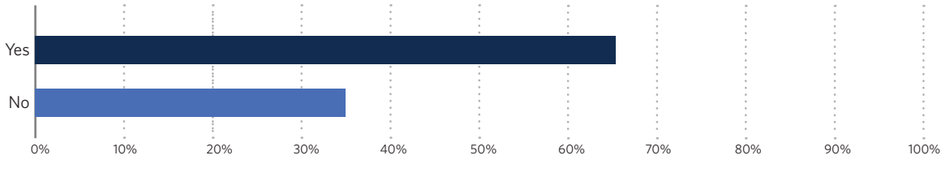


CAPACITY AND FACILITIES

What is your venue's capacity?

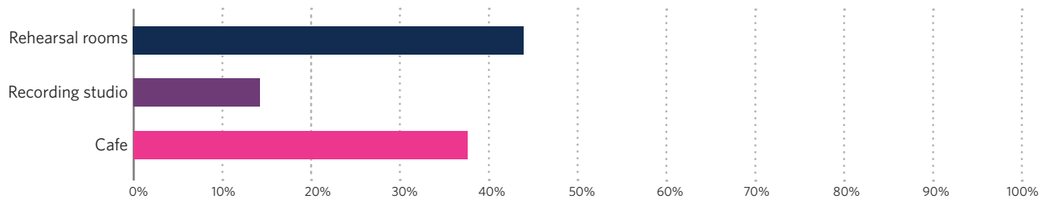


Do you have disabled access?

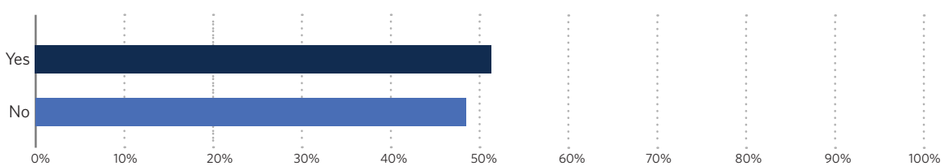


CAPACITY AND FACILITIES

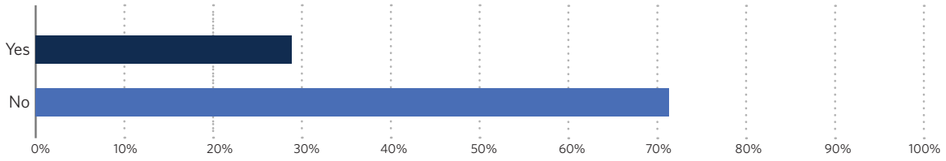
Which of the following ancillary services do you provide?



Do you have backline?

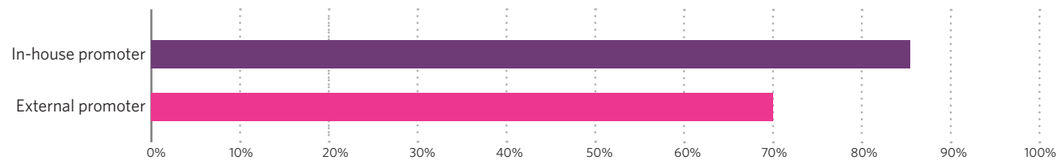


If so, do you hire it out for use off the premises?

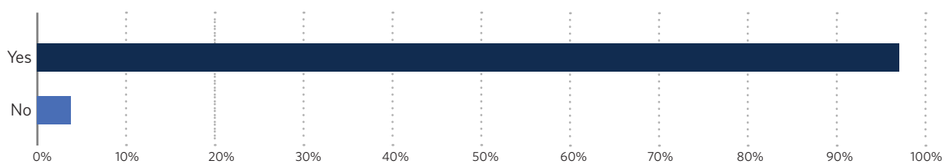


PROMOTION AND PROGRAMMING

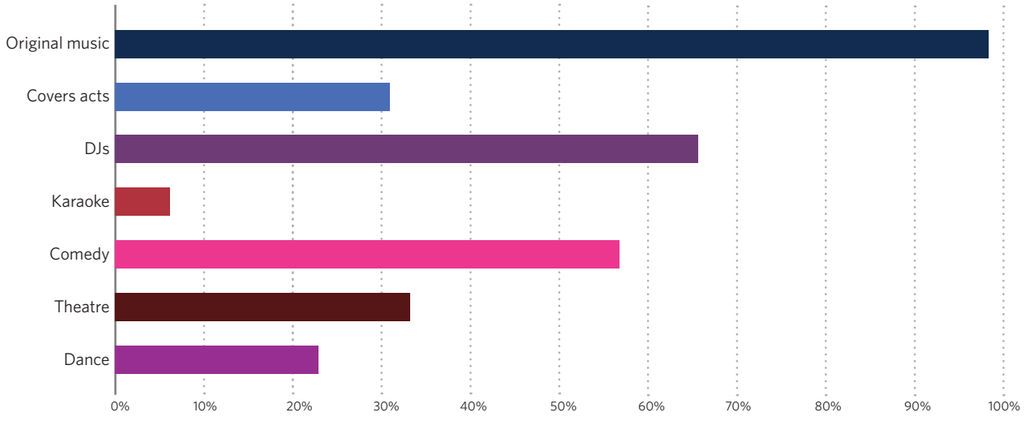
Which of the following do you have?



Do you hire out the venue?

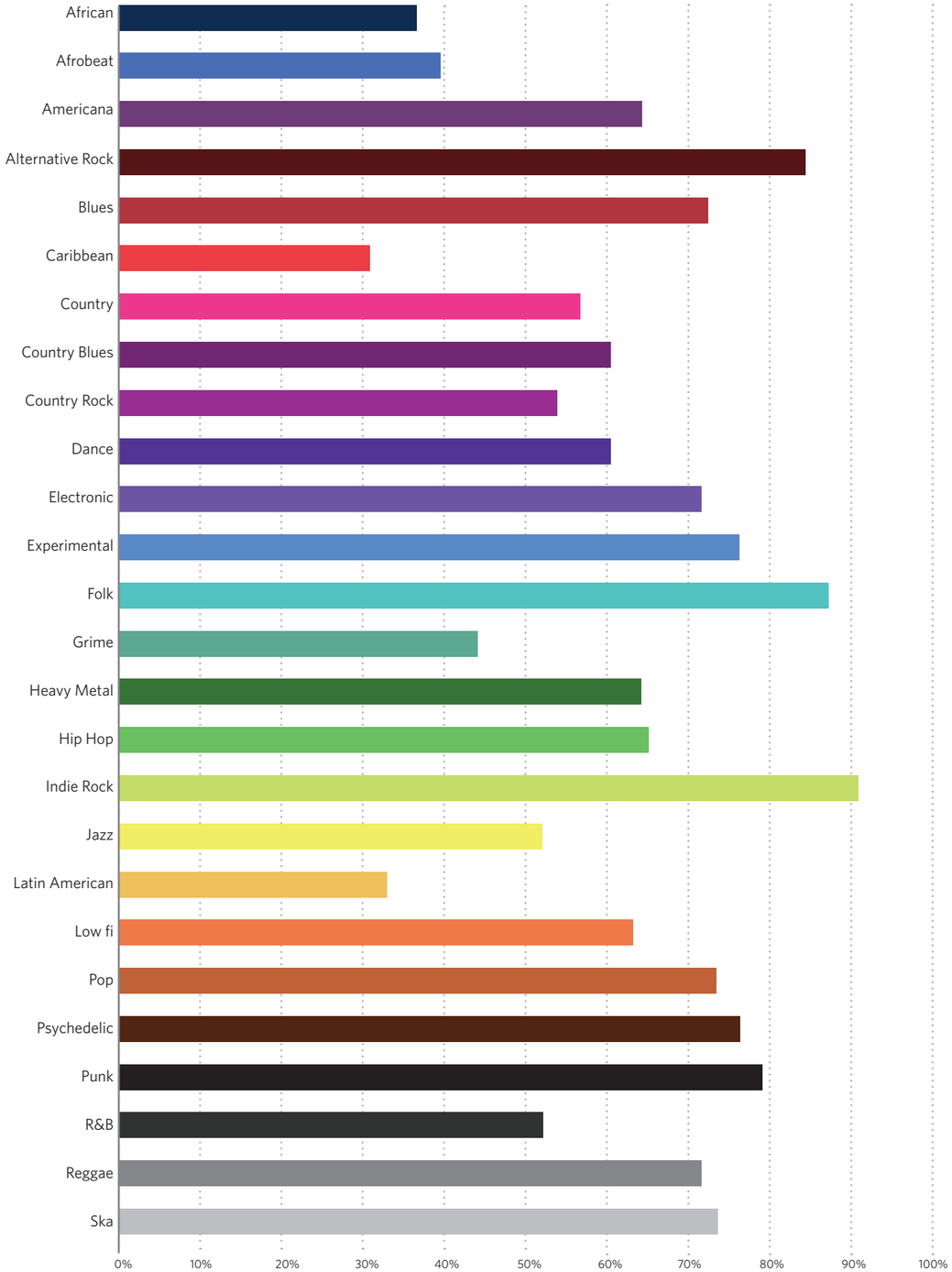


Acts programmed



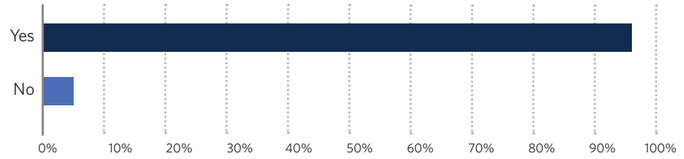
PROMOTION AND PROGRAMMING

Which genres of music do you programme?

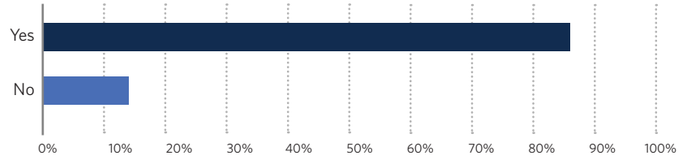


LICENCING AND GUIDELINES

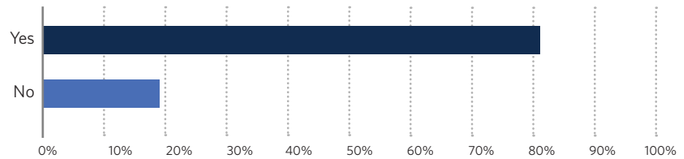
Do you have a PRS licence?



Do you have a PPL licence?



Do you operate to the Musicians' Union Fair Play guidelines?



APPENDIX II
VENUES DAY 2014
SCHEDULE

VENUES DAY 2014

PURCELL ROOM, SOUTHBANK CENTRE, LONDON
Tuesday 9th December

12.00 - 13.00

REGISTRATION / BUFFET LUNCH AND NETWORKING SESSION
We will be serving a sandwich lunch with soft drinks to greet you upon your arrival

---

13.00

INTRODUCTION (PURCELL ROOM)
Housekeeping, introduction to the day and survey feedback

Music Venue Trust
Independent Venue Week
Southbank Centre
ICMP

13.30

DROWNED IN SOUND PRESENTS MAKING GOOD VENUES GREAT (PURCELL ROOM)
What makes a good venue into a great venue? What could venues do more of to increase their value to music fans and to musicians? How do we reach new audiences and talk to the industry better?

Chair:
Sean Adams - Drowned in Sound
Panellists:
Horace Trubridge - Musicians' Union
Suzanne Bull MBE - Attitude is Everything
Sybil Bell - MVT/IVW
Mike Weatherley MP - Rock the House
Steve Tilley - Kilimanjaro Live/ Sugarmill, Stoke
Jehnny Beth - Musician, Savages

14.30

NOISE VS. NUISANCE (PURCELL ROOM)
What are the factors that can make your music noise a nuisance and how can you manage it? Do we need an Agent of Change principle?

Chair:
Kerry McCarthy MP
Panellists:
Lisa Lavia - Noise Abatement Society
Howard Price - Chartered Institute of Environmental Health
Dom Frazer - The Boileroom
Niall Forde - Islington Council
Andrew Jarvis (Moderator - Acoustics)
Jeremy Mills (Moderator - Legal compliance)

VENUES DAY 2014

Tuesday 9th December

15.30 - 16.45

NETWORKING/IDEAS LAB/MARKETPLACE /RESEARCH (FOYER)

Afternoon tea & coffee with a chance to meet other venues, agents and ACE representatives, to hear new ideas for venues and to get your views heard. Talk to our research team, leave us an anonymous message and sound off in the STEAM ROOM.

Networking:
Meet ACE representatives, other venues, grab five minutes with an agent (The Agency, ITB, CAA, Coda, 13 Artists, Primary, Moneypenny) and a chance to meet other music industry and arts representatives.

Marketplace:
Initiatives for venues, further information from speakers, find out about some of our partners.

Ideas Lab:
Innovative ideas for venues; going green, going online, how to network, generating funding to support ourselves and developing skills.

16.45

MOVE ON UP - WHAT NEXT?

What have we learned and what can key stakeholders do about it?

Chair:
Jane Beese - Southbank Centre
Panellists:
Geoff Meall - The Agency
Jo Dipple - UK Music
Ben Lane - Arts Council England
Rob Challice -Coda
Mark Davyd -Music Venue Trust
John Robb - Louder Than War

17.45

WRAP UP (PURCELL ROOM)

Closing remarks

18.00

DRINKS RECEPTION

Please join us for a celebration drink in the Purcell Room foyer. Courtesy of our agency partners (CAA, CODA, ITB, The Agency, X Ray) and in association with Jack Daniels, Sailor Jerrys, Sunny Republic, Pistonhead, Asahi and with the Point Blank Coldbrew Cocktail bar.

APPENDIX III
VENUES DAY 2014
DELEGATE LIST

Abigail Whithair
The Bull's Head, London

Adam Brooks
Ents 24

Adam Sherwin
The Independent

Adam Webb
Attitude is Everything

Adele Bailey
Plug, Sheffield

Adrian Bell
The Horn, St Albans

Aidan James Stevens
Musician

Aled Chivers
The Louisiana, Bristol

Alex Cunningham
MP

Alex Gilbert
Academy Music Group

Alex Mann
Musicians' Union

Alice Cantillon Ings
Live UK

Alx Leeks
MVT Event Assistant

Amanda Betts
The Joiners, Southampton

Amy Corcoran
Strongroom Bar & Kitchen, London

Andrew Ellis
Merseyside Arts Foundation

Andrew Jarvis
WSP Group

Andy Cuthbert
MVT Graphic Designer

Andy Dutton
The Dog and Whistle, Hertford

Andy Gunton
The Stinger

Andy Inglis
5000

Andy Malt
CMU

Andy Stewart
The Fleece, Bristol

Angus Baskerville
13 Artists

Anita Randall
MVT Event Assistant

Anthony Chalmers
Corsica Studios, London

Archie Carmichael
Live UK

Auro Foxcroft
Village Underground, London

Barney Jeavons
West End Centre, Aldershot

Ben Coles
CAA

Ben Easton
Louder Than War

Ben Lane
Arts Council England, Head of Music

Ben Perry
The Railway, Winchester

Ben Wall
Independent, Sunderland

Bethany Rose
BIMM

Beverley Whitrick
Music Venue Trust / Venues Day Producer

Bex Majors
CAA

Bob Allan
Generator

Brent Smith
Sunny Republic

Bruce Mendes
BIMM

Caffy St Luce
The Zine

Cameron Kellow
ICMP

Caren Ashton-Penketh
Cambridge Junction

Carl Gosling
The Social, London

Carl Martin
cahm.uk

Carolyn Gray
Blam

Carrie Davies
Half Moon Putney, London

Charles Raworth
Bush Hall, London

Charlotte Lavendar
The Soundhouse Leicester

Chiara Badiali
Julie's Bicycle

Chloe Alexander
Parliamentary Researcher

Chloe Ward
Independent Venue Week

Chris Bye
Arts Council England, North region

Chris Childs
Sticky Mike's Frog Bar, Brighton

Chris Cobain
The Georgian Theatre, Stockton-on-Tees

Chris Prosser
Music Venue Trust / ILMC / IQ

Chris Sharp
The Fleece, Bristol

Chris Thorpe
Forum TV

Chris Tyler
The Kazimier, Liverpool

Claire Baker
CODA

Claire Horseman
CODA

Damien Fell
Alfie Bird's, Birmingham

Dan Salter
Echoes and Dust

Dan Saunderson
The Agency

Daniel Brine
Cambridge Junction

Daniel Smith
ICMP

Danni Brownsill
The Sugarmill, Stoke-on-Trent

Darren Nockles
The Musician, Leicester

Darren Simons
The Victoria, Swindon

Darren Weale
Blues Matters Magazine

Dave Bennett
The Square, Harlow

Dave Webster
Musicians' Union

David Ball
CAA

David Butler
The Tin at The Coal Vaults, Coventry

David Gaydon
The Roundhouse, London

David Gedge
The Wedding Present

David Goodchild
The Cavern, Exeter

David Manso
Notting Hill Arts Club, London

David Messer
Dingwalls, London

David Norris
The Roadmender, Northampton

David Sterlin
The Roadmender, Northampton

David White
BIMM

David Whittall
Suki10c, Birmingham

Dawn Noah
Attitude is Everything

Delia Sparrow
The Lexington, London

Dion Mason
BIMM

Dominique Frazer
The Boileroom, Guildford

Dorothy Levine
UK Music

Ed Lilo
Birthdays, London

Elaine McGinty
The Phoenix Cultural Centre, Woking

Eliza Frost
Spindle Magazine

Ella Cullinan
BIMM

Ellie Bothwell
Publican's Morning Advertiser

Emily Gray
Southbank Centre

Emma Hogan
ITB

Emma Webster
The Music Inn, Oxford / Live Music Exchange

Evelyn Patrick
Tiki Bar and Grill, Plymouth

Gareth Dylan Smith
ICMP, Researcher

Gareth Ospina
Live UK

Gary Prosser
All Night Long Promotions

Gavin Sharp
Band on the Wall, Manchester

Gawain Forster
Band on the Wall, Manchester

Gemma Broughton
Southbank Centre

Gen Williams
BPI

Genevieve Pace
Creative United

Geoff Meall
The Agency

Geoff Priestley
The Wedgewood Rooms, Portsmouth

Gideon Feldman
Attitude is Everything

Gloria Elliott
Noise Abatement Society

Glyn Hughes
Clwb Ifor Bach, Cardiff

Gordon Masson
IQ

Graham Griffiths
Attitude is Everything

Graham McLean
Ents 24

Greg Parmley
ILMC

Greg Phizacklea
Electric Ballroom, London

Greg Poole
The Soundhouse Leicester

Gudrun Getz
Passing Clouds, London

Guto Brychan
Clwb Ifor Bach, Cardiff

Hannah Dunn
ICMP

Hannah Morgan
Echoes and Dust

Hansi Koppe
The Horn, St Albans

Helen McGee
Academy Music Group

Helen Tucker
Stage and Scene Insider

Helena Nial
Chartered Institute of Environmental Health

Helienne Lindvall
The Guardian /Digital Music News

Holly Simmons
The Jericho Tavern, Oxford

Horace Trubridge
Musicians' Union

Howard Price
Chartered Institute of Environmental Health

Huey Walker
Arts Council England, London region

Hugo Mintz
Southbank Centre

Ian Carrell
Norwich Arts Centre

Ian Kelly
ICMP

Jacob Adams
Attitude is Everything

Jak McNally
ICMP

Jamal Guthrie
The Waiting Room, London

James Beck
KU BAR, Stockton-on-Tees

James Duffy
Pocklington Arts Centre, York

James Hanley
Live UK

James Hanley
Audience UK

James Ketchell
The George Tavern, London

James Smith
Hope & Anchor, London

James Vince
Live in the Living Room

Jamie Ford
The 1865, Southampton

Jamie Joslyn
Flairz Venue Bar, Hastings

Jamie-Lee
Warlow Hobos Music Venue, Bridgend

Jane Beese
Southbank Centre, Head of Contemporary Music

Janet Farmer
Pocklington Arts Centre, York

Jason Dormon
Music Venue Trust / Tunbridge Wells Forum

Jehnny Beth
Savages

Jeremy Mills
Music Venue Trust / Mills Keep Ltd

Jeremy Pritchard
Everything Everything

Jessica McMillan
The Wedding Present

Jo Bennett
Bush Hall, London

Jo Dipple
UK Music

Jo Foster
Ministry of Sound

Jo McAllen
BIMM

Joanna Ashmore
CODA

Joe Edwards
Independent Venue Week

Joe Vesayaporn
MusicGlue

John Denham
MP

John Robb
Louder Than War

Jonathan Robinson
MusicTank

Jonathan Todd
UK Music

Julia Payne
The Hub

Justine Fancy
Academy Music Group

Kat Head
BIMM

Kate Dansie
CODA

Kate Hewett
The Harley, Sheffield

Kate Mountain
The Roadhouse, Manchester

Kate Walters
St John at Hackney, London

Katharine Wallinger
The Wedding Present

Kathryn Shackleton
Watermill Jazz @ Friends Life Social Club, Dorking

Katrina Keen
BIMM

Katy Oliver
New Cross Inn, London

Keith Miller
Shacklewell Arms, London

Kelly Wood
Musicians' Union

Kerry McCarthy
MP

Kevin Grist
Arts Council England, South East region

Kevin Searby
The Lincoln Imp, Scunthorpe

Kieran Matthews
BIMM

Kimberly Campanello
ICMP, Researcher

Knut Sellevold
Servant Jazz Quarters, London

Lais Martins-Waring
Punktastic

Laura Bradley
Sprout PR

Lauren Sadler
Southbank Centre

Lee Gorton
The Roadhouse, Manchester

Liam Baker
Moles, Bath

Liam Keightley
ITB

Liam Naughton
The Kazimier, Liverpool

Liam O'Brien
The Haunt, Brighton

Lianne Jarrett
Noise Abatement Society

Liliana Mecedes Darkwa
ICMP

Lisa Lavia
Noise Abatement Society

Liz Stokes
Record of the Day

Loretta De Feo
Sebright Arms, London

Lou Percival
IQ

Louise Kovacs
Academy Music Group

Lucas Polo
ICMP

Lucy Dickins
ITB

Lucy Stone
MVT Event Assistant

Luke Davies
BIMM

Luke Hinton
Cheri's Bar, Hemel Hempstead / Juicebox

Luke Streeter
BIMM

Lydia Stockbridge
The Boileroom, Guildford

M.E. Gasson
Gigantic Tickets

Makeila Estelle
ICMP

Malory Holden
The Agency

Marcel Apfel
Ministry of Sound

Mark Bennett
The Agency

Mark Davyd
Music Venue Trust / Tunbridge Wells Forum

Mark Hunter
ICMP, Researcher

Mark Morriss
Musician

Mark Randall
MVT Event Assistant

Mark Roe
Forum TV

Martyn Solomon
Sunny Republic

Mat Ong
Surya, London

Matt Booth
Sidmouth Drill Hall Hub

Matt Hanner
CODA

Matt Harquail
Forum TV

Matt Lott
ICMP

Matt Lucas
Forum TV

Matt Newton
BIMM

Max Moran
The Lock Tavern, London

Mel Thornton
BIMM

Michael Kendal
Independent, Sunderland

Micky Sheehan
The Victoria Inn, Derby

Mike Dines
ICMP, Researcher

Mike Weatherley
MP

Miles Jelfs
The Fleece, Bristol

Natali Shaked
ICMP

Natalie Lee
The Roadmender, Northampton

Natasha Stevens
Musician

Nathan Clark
Brudenell Social Club, Leeds

Nathan Jones
Buffalo Bar, Cardiff

Neale Tidd
The Roadmender, Northampton

Niall Forde
Islington Council

Nicholas Brookes
PRS for Music

Nick Stewart
Sneaky Pete's, Edinburgh

Nicky Carder
Electric Circus, Edinburgh

Nicola Holland
Skinny Kitten Events

Nicola Muir
Southbank Centre

Nigel Morton
Moneypenny Agency

Nik Sharpe
The Cookie, Leicester

Nina Rubesa
ICMP

Oliver Carruthers
Rich Mix, London

Olivia Sime
ITB

Ollie Daniels
BIMM

Orla Hannon
MVT Event Assistant

Pasco-Q Kevlin
Norwich Arts Centre

Pat Pope
Photographer

Patrice Gerrard
Southbank Centre

Patrick Cunningham
Exeter Phoenix

Patrick Dighton
Tunbridge Wells Forum

Patrick McNaught
BIMM

Paul Bonham
Arts Council England, London region

Paul Broadhurst
Senior Music Officer, Greater London Authority

Paul Burrows
Musicians' Union

Paul Curry
Harveys at The Horseshoes, Luton

Paul Hooper
The 1865, Southampton

Paul Jackson
New Adelphi Club, Hull

Paul Lilley
100 Club, London

Paul McManus
Music Industries Association

Paul Michelmore
The Harrison Pub, London

Paul Osmond
The Union Bar, Hastings

Paul Scaife
Record of the Day

Pete Burridge
Bedford Esquires

Pete Lambrou
The Good Ship, London

Phil Nelson
BIMM

Phil Simpson
Regent Music

Phil Sisson
Strongroom Bar & Kitchen, London

Phyllis Belezos
ITB

Rachel Hunter
Noise Abatement Society

Rachel Porter
Southbank Centre

Ray Jones
Time Out

Rebecca McGuire
BIMM

Rebecca Walker
The Leadmill, Sheffield

Reo Imeson
Independent Venue Week

Richard Littman
Mermaid Theatre, London

Richard Simm
Tunbridge Wells Forum

Richard Watson
Library, Leeds

Rick Finlay
Musicians' Union

Ricky Bates
The Joiners, Southampton

Rob Challice
CODA

Rob Toogood
Fuel Rock Club, Cardiff

Robert Hicks
Ironworks, Inverness

Robert Tinkler
Cambridge Junction

Rosie Arnold
Norwich Arts Centre

Ross Allmark
The Old Blue Last, London

Ross Warnock
The Agency

Rupert Leigh
Pop Shop Agency

Russ Callaghan-Grooms
MVT Event Assistant

Russell Deeks
Songwriting Magazine

Ruth Barnes
Amazing Radio

Sagal Yusuf
BIMM

Sam Sutherland
ICMP

Samantha Dabb
Le Pub, Newport

Samantha Porter
Coronet Theatre, London

Sarah Morgan
The Tin at The Coal Vaults, Coventry

Sarah Thirtle
Creative United

Sean Adams
Drowned in Sound

Sean Hitchings
93 Feet East, London

Sean Morgan
Academy Music Group

Segun Lee-French
Arts Council England, Midlands region

Serena Kutchinsky
Prospect

Serena Robb
BIMM

Shanice Lucas
BIMM

Simon Roberts
Ticketmaster

Stephanie Allen
Creative United

Steve Bines
The Moon Club, Cardiff

Steve McCabe
MP

Steve Parker
Live UK

Steve Syles
The Horn, St Albans

Steve Tilley
The Sugarmill, Stoke-on-Trent / Kilimanjaro Live

Steve Zapp
ITB

Stewart Baxter
New Adelphi Club, Hull

Stuart Lyon
Moneypenny Agency

Stuart Palmer
BIMM

Sukie Smith
Amazing Radio

Susan Thornhill
The Troubadour, London

Suzanne Bull MBE
Attitude is Everything

Sybil Bell
Independent Venue Week / Music Venue Trust

Tara Odev
BIMM

Tim Arnold
Musician

Tim Clement-Jones CBE
House of Lords

Tim Perry
Windmill Brixton, London

Tom Kiehl
UK Music

Tom Madicott
Moles, Bath

Tom Martin
The Tower of Song, Birmingham

Tom Parkinson
ICMP, Researcher

Tom Taaffe
The Agency

Tony Gleed
The Dublin Castle, London

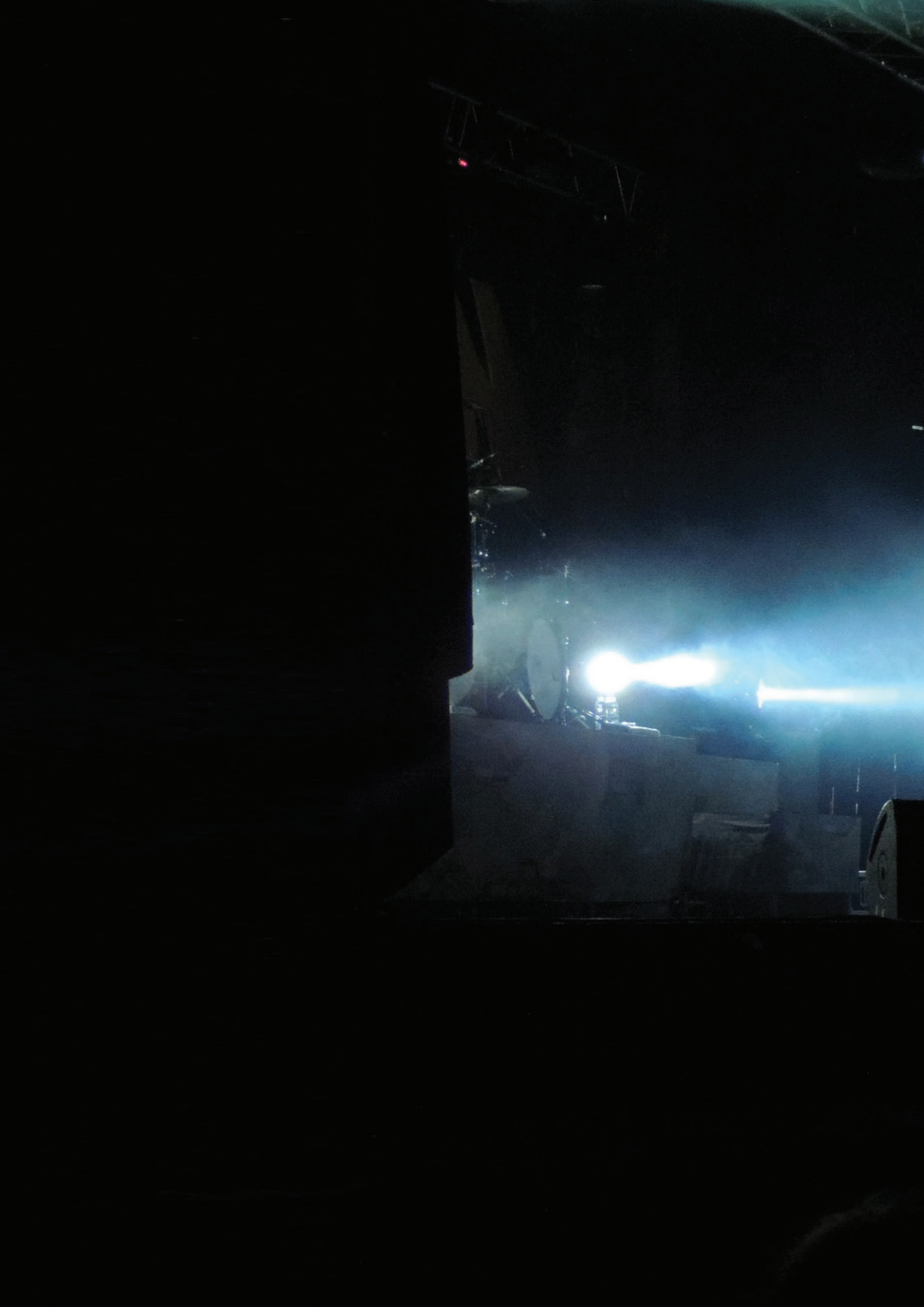
Tony Graffiti
The Roadhouse, Birmingham

Tony Moore
The Bedford, London

Vez Hoper
The Cellar, Oxford

Victor Redwood
Sawyer Arts Council England, London region

Vinesh Patel
The Agency

Vreti Brew
Koshal The Roadmender, Northampton

Zoe Hinks
The Roadhouse, Birmingham