



UNDERSTANDING SMALL MUSIC VENUES

AN INTERIM FINDINGS REPORT

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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 feel this research is crucial to understanding what the music industry, the cultural sector and local and national government can do to ensure we act together to protect it. We are proud to be launching this interim report today to start the conversation.

The interim report reinforces our belief that there is a national challenge to our live music venue circuit. This situation has been created by a sequence of events and developments which have left that network in a perilous and precarious state. Music Venue Trust feels that we need to take an overall view of the challenges out there. We need to be openly discussing and airing those challenges with our live music industry colleagues, and working together to tackle that range of issues so we not only maintain and preserve this circuit but actively start to improve it. We feel that past failures to talk about the ecosystem of UK music have meant that people who don't actively work in it perhaps don't understand the structure of the industry, or the vital role that this network of venues plays in maintaining it.

The UK is, quite literally, a music world leader, punching vastly above its weight in terms of the impact our artists and musicians make across the globe. A huge proportion of the music we export, which generates thousands of jobs, develops the artistic careers of our best writers and musicians, and is such an important part of the UK's standing on the international cultural stage, starts in a small venue. This is the grassroots of our industry, the research and development department of our major international music industry partners. We don't think we can overstate this enough; no Troubadour or 12 Bar Club, no Adele. Our UK music, arguably the best in the world, is built on a robust ecosystem that starts with a first live concert in front of as few as ten people on a Tuesday night in Guildford and climaxes with 3 nights at Wembley Stadium. And it's not just the musicians - our industry and other parts of the creative sector are filled with people who cut their teeth promoting, booking or simply working the door at a small venue. This small venue circuit is the training ground and the entry level experience for our lighting engineers, sound technicians, and cultural organisers at all levels; we need to ensure we do all we can to protect it.

A full report will be released on Monday 9 March 2015, when Music Venue Trust will be announcing its response to what we've learned.

Mark Davyd
CEO
Music Venue Trust
27/01/15

Understanding small music venues: An interim findings report

This report summarizes the interim findings of a research project undertaken by the Institute of Contemporary Music Performance (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. A more extensive report is in preparation and will form part of a submission to Parliament on 9 March.

1. Methodology

The research followed a mixed methods approach comprising a survey and interviews. 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, a large networking event organized by MVT and held at London's Southbank Centre on 9 December 2014. As such, all 107 survey respondents were subsequently registered as delegates for Venues Day 2014. The participants 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 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. It is hoped that the significant exposure garnered by Venues Day 2014 will help us to capture more data going forward.

Interview participants were sourced from the delegates and 18 interviews were conducted during Venues Day 2014. 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, the themes covered in the interviews are prominent within public discussion surrounding the live music sector, and within general discourse surrounding cultural spaces; this is reflected in our forthcoming literature review. 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 confidentiality¹.

¹ 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.

A final data set is comprised of transcriptions of three themed panel discussions that took place on Venues Day. 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.

This interim report focuses primarily on interview findings, and our emphasis is on thematic summary as opposed to inferential analysis, which we will present at a later stage.

2. Analysis

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

3. Themes

3.1 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:

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.

3.2 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?"

3.3 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.

3.4 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 venue's 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.

3.5 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 a government apprentice who was funded by UK Music.

3.6 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 _____ 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 band, they just played and then went outside.

3.7 PRS and PPL. 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 our 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.

3.8 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.

3.9. 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 _____, we won 'best venue in _____' [two years running], we won the 'best venue in the country' through _____, but no one ever saw fit to give us a penny.

4. Going forward

As noted earlier, we are working towards a more extensive analysis incorporating a literature and contextual review, for publication in March. In the interim we intend to conduct further interviews from the 107 venue representatives who attended Venues Day 2014. If you would like to participate, please get in touch!

27th January 2015

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