REF NO. CTEEA/S5/19/AF/

SUBMITTING EVIDENCE TO A SCOTTISH PARLIAMENT COMMITTEE

DATA PROTECTION FORM

Name:	**Mark Davyd**
Date:	**12 April 2019**
Organisation: (if required)	**Music Venue Trust**
Topic of submission:	**Arts Funding**

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REF NO. CTEEA/S5/19/AF/

CULTURE, TOURISM, EUROPE AND EXTERNAL AFFAIRS COMMITTEE

ARTS FUNDING INQUIRY

SUBMISSION FROM MUSIC VENUE TRUST

Music Venue Trust response to Arts Funding Inquiry (REF NO. CTEEA/S5/19/AF/)

1. About Music Venue Trust

Music Venue Trust is a registered charity which acts to protect, secure and improve Grassroots Music Venues in the UK [1]

Music Venue Trust is the representative body of the Music Venues Alliance [2], a network of over 500 Grassroots Music Venues in the UK. It currently has 47 Grassroots Music Venue members in Scotland, listed in Annex C.

2. Grassroots Music Venues in 2019

A. A nationally and internationally accepted definition of a Grassroots Music Venue (GMV) is provided at Annex D. This definition is now in wide usage, including by UK Parliament. [3]

B. GMVs exhibit a specific set of social, cultural and economic attributes which are of special importance to communities, artists, audiences, and to the wider music industry. This sector has played a vital research and nurturing role in the development of the careers of a succession of Scottish musicians, from The Cas Rock (Idlewild, Edinburgh), 13th Note (Franz Ferdinand, Glasgow), Nice'n'Sleazy (Mogwai, Arab Strap, Glasgow), Sneaky Pete's (Young Fathers), Mars Bar (Altered Images, Glasgow), Ellington Arms (Eddie Reader, Irvine), Daddy Warbuck's (Primal Scream, BMX Bandits, Glasgow), King Tut's (KT Tunstall, Glasgow). All three of the UK's highest grossing live music attractions in 2017 (Adele, Ed Sheeran, Coldplay) commenced their careers with extensive touring in this circuit. [4]

C. GMVs constitute a network with comprehensive geographical presence and with a reach that extends into communities which are otherwise not engaging with culture.

"The original 13th Note in Glassford Street, Glasgow, was of huge importance when we got together as a band in 1994. We were going along weekly to hear Radio Scotland presenters Peter Easton, John Cavanagh and Mark Percival DJ, and also watch a load of new bands that were being put on by Alex Kapranos and RM Hubbert at the time. There were loads of musicians there, all chatting about up-and-coming albums and tours, and there was a real sense of excitement that there was something to build on. The DIY scene was alive and well, and the idea of starting Chemikal Underground came out of all of that activity as there were so many great bands around." - Emma Pollock, The Delgados & Chemikal Underground

D. During the last twenty years, this sector has declined substantially across the UK

i. 144 Grassroots Music Venues were trading in London in 2007
ii. Only 94 GMVs were trading in London in 2016, a reduction in the number of trading spaces of 34.7% [5]
iii. Iconic spaces across the UK closed during this period, including Electric Circus (Edinburgh), Studio 24 (Edinburgh), The Arches (Glasgow), The Picture House (Edinburgh), Citrus Club (Edinburgh), The Captain's Rest (Glasgow), Barfly (Glasgow), The Marquee (London), The Point (Cardiff), TJs (Newport), Roadhouse (Manchester), Boardwalk (Sheffield), The Crypt (Hastings), The Croft (Bristol) [6]
iv. Every major town and city saw a decline in the number of trading venues
v. Of the 25 venues that launched the live career of Oasis in 1993, only 11 remain open. [7]

E. Alongside closures, these venues also experienced [8]:

i. Significantly reduced audience attendances; GMVs operate at significantly reduced capacity, with an average attendance of 160.5, only 51%
ii. Reduced opportunities for artists to perform; GMVs are open for live music 3.89 times per week, only 55% of the time
iii. Rapidly deteriorating infrastructure that is inadequate to support the delivery of artistic excellence.

F. As a result of the decline, entry prices have stagnated, resulting in:

i. reduced earnings potential for artists
ii. a downward spiral of under investment

G. Despite this decline, there are still circa 550 such music venues currently operating in the UK.

H. Audience research conducted by Music Venue Trust in April 2016 formed part of the UK Music Wish You Were Here Report 2016 [9], the first time that accurate tracking of activity in this sector had been attempted.

I. Additional venue and artist research carried out by Music Venue Trust in May and June 2016 provided further information about audience attendance and performance activity related to GMVs. That research established that GMVs across the UK:

i. Have an average capacity of 316, a total capacity of 126,400 per night
ii. Deliver 1556 shows per week, 80,912 shows per annum
iii. Create 4,668 performance opportunities per week, 242,736 performance opportunities per annum
iv. 249,667 people attend every week, 12,982,667 people per annum.

J. Based upon the above and in-depth research carried out in 2015 to 2017 by the Mayor of London and the Greater London Authority, specific to the function and operation of GMVs within London [10], it is deduced that these 550 GMVs:

i. Contribute circa £390millon to the UK economy
ii. Invest circa £187million per annum in talent development
iii. Support circa 9600 full time equivalent jobs.

K. Grassroots Music Venues are the small business entrepreneurs of the UK music industry, taking exceptional risks with programming and support for new and emerging artists. This activity produces long-term significant economic outcomes for the wider industry and for the UK. In 2015, the UK Music Industry provided:

i. Total GVA: £4.1billion
ii. Total Export Revenue: £2.2billion
iii. 119,020 FTE jobs.

L. GMVs have demonstrated a strong and passionate engagement with local and regional audiences, addressing Creative Scotland core aims; that everyone actively values and celebrates arts and creativity as the heartbeat for our lives and the world in which we live; which continually extends its imagination and ways of doing things; and where the arts, screen and creative industries are confident, connected and thriving.[11]

"Music fans that attend gigs in these grassroots venues have a voracious appetite for live music and a high percentage attend shows regularly, which not only helps build an active local music scene but also supports local talent, enterprise and business." – UK Music, Wish You Were Here 2016

M. Despite the intent of Creative Scotland's core aims, Grassroots Music Venues receive almost no funding from Creative Scotland or other cultural distribution agencies.

   i. Creative Scotland Regular Funding Network announcement distributed £101,623,507 to 121 organisations between 2018-22
   ii. £11,425,000 (11.24%) was distributed to music organisations in different genres. This figure does not include National Performing Companies which are directly funded by Scottish Government.
      a. £1,050,000 to Festivals (9.19%)
      b. £4,120.000 Classical (36.06%)
      c. £995,000 to Education (8.71%)
      d. £3,935,000 to Traditional (34.44%)
      e. £650,000 to Jazz (5.69%)
      f. £600,000 to choral (5.25%)
      g. £570,000 to mixed (4.99%)
      h. £500,000 to contemporary (rock, pop, indie, urban, hip hop, rap, electronic etc (4.38%)
   iii. Of the distribution to contemporary, 100% went to Scottish Music Industry Association.
   iv. While acknowledging the crisis in Grassroots Music Venues [12], in the RFO distribution 2018-21, Creative Scotland funding for GMV equated to:
      a. 0% of the total distribution
      b. 0% of the distribution to Music
      c. 0% of the distribution to Contemporary Music
   v. This challenge of a lack of distribution of available cultural funding to support the crisis impacting on Scottish Grassroots Music Venues is not limited to Regular Funding stream. In 2018, Open and Targeted funding to SGMVs was also 0%.

N. Across the EU, governments have provided a variety of mechanisms to subsidise and underwrite investment in Grassroots Music Venues, resulting in an average subsidy of 42% of total turnover, as high as 70% in France.[14] These initiatives have resulted in exceptional facilities in many of our neighbouring territories, with greater performance fees to artists, higher employment levels, greater numbers of apprentices and training opportunities being just some of the outcomes.[15]

O. Scotland's comparative lack of support and investment into Grassroots Music Venues is failing to compete with emerging markets and to support the development of skilled UK artists and supporting professionals, specifically those at the beginning of their careers.

P. Examples of comparative investment in emerging markets:

i. The German Government announced a package of investments into Grassroots Music Venues to a value of €8.2million in November 2016 (Förderprogramme zur technischen Erneuerung der Aufführungstechnik von Musikclubs).[16] The programme is specifically aimed at a move to digital equipment which is high quality and reduces energy consumption and costs.

ii. In the Netherlands, every middle-sized town or city (approx. 100.000 inhabitants) has a music venue for popular music genres. Fifty-one of these music venues receive funding from the Government following the advice of Muziek Centrum Nederland.[17]

iii. In Denmark, the Government has established an infrastructure and trading subsidy budget which has developed 19 Grassroots Music Venues of exceptionally high quality. These venues receive ongoing subsidy to create local jobs, support for musician micro-businesses, and platforms for local emerging talent – at the full subsidy rate, each of these 19 venues commits to paying each performing musician 2000 Krone, a fee equating to £250 per band member per performance.[18]

iv. In Norway, The Musikkutstyrsordningen (Norwegian Musical Equipment Foundation) gives bi-annual grants to studios, venues, community groups, and rehearsal spaces for upgrading facilities and maintaining and purchasing equipment. It was established in 2009 and distributes circa 27.5 - 30 million kr per year (£2.5 - £2.8 million). Although it is a national subsidy/state funding scheme, it is governed by a General Assembly comprised of some of the key music trade bodies in Norway [19].

v. In France, GMVs receive operational support from: Le ministère de la Culture et de la Communication, Le ministère de la Ville, de la Jeunesse et des Sports, Le ministère de la Justice L'Union Européenne - Lifelong Learning Programme and La SACEM. Le CNV - Centre National de la chanson des Variétés et du jazz – administers two schemes by which a levy is paid by all live music events and distributed to Grassroots Music Venues:
    a. to promote risk taking with programming at grassroots level.[20] 195 venues benefitted in 2015
    b. to improve the infrastructure at Grassroots Music Venues.[21] 59 venues benefitted in 2015.

vi. Each of the UK's nearest geographical competitors for international touring have established programmes to support infrastructure for GMVs.

3. Our Response to the Culture, Tourism, Europe and External Affairs Committee Call for Evidence: Funding of The Arts

A. Music Venue Trust warmly welcomes the Call for Evidence and the opportunity to offer specific input on the crisis facing Scotland's Grassroots Music Venues.

B. The closure and inadequate financing and support of Grassroots Music Venues in Scotland has direct negative impacts on artists and audiences of every genre, style and background, resulting in:

   i. failure to upgrade facilities, resulting in potential new music fans not being attracted to decaying and inadequate facilities. This is a situation exacerbated by the investment in larger scale venues widening the experience gap of attending live music in GMVs and large venues/arenas
   ii. poor artist experience, where musicians have below par facilities both on-stage and backstage
   iii. ageing attendee demographics as young fans are unimpressed with the GMVs and do not return
   iv. less innovative and experimental programming, arising from a financial inability to accept risk, resulting in
      a. less opportunities for innovative performers to find audiences and to earn
      b. less diversity of artists performing in GMVs as venues have not been able to take risks to find new sets of performers and audiences
   v. inadequate promotion, as programmers have limited budgets for advertising and profile-raising. This is not just about attracting an immediate audience but also raising awareness of an artist, i.e. good advertising for shows early in a band's career can increase attendance at bigger venues later in their career
   vi. Taken together, these outcomes result in:
      a. Reduced access to live music experiences
      b. Decrease in performance/earning opportunities for musicians
      c. Decline in the number of touring dates taking place in Scotland
      d. Decline in the number of affordable quality live music experiences

C. These direct impacts have short and long-term implications for Scottish music and can be illustrated by data gathered from across the UK live music industry

   i. One third (29%) of Promoters responding to the UK Live Music Census said that venue closure had an extreme, strong or moderate negative impact on their events in the last 12 months.
   ii. When asked to describe the most significant problems faced as a live music promoter, one third of respondents (34%) mentioned venues
   iii. 44% of promoters who responded to a question about the barriers that impact on putting on live music in their locale also mentioned venues. Problems and barriers included a lack of venues, cost of venues, and a lack of suitable infrastructure within the venue itself.
   iv. 42% of promoters who responded to an open-ended question about what the (local, national and/or UK) government could do to improve the live music scene mentioned venues, 37% mentioned funding or grants; and 16% mentioned schools or education

v. Festival Headliners are ageing [22]
vi. New artists are struggling to build audiences [23]

D. Music Venue Trust believes strongly that the Scottish cultural sector and music industry have failed to understand the social, economic and cultural value of these spaces. We have undertaken substantial research and partnered with a range of agencies to establish a clear and evidenced picture of the strengths, weaknesses, opportunities and threats faced by Grassroots Music Venues. An inconsistent approach to what constitutes a cultural venue from the cultural sector has created a common perception that theatres, arts centres, concert halls and galleries require subsidy to operate, yet a suggestion that GMVs may require support too is regularly met with the assertion that these are commercial operations. The fact that talent developed in these spaces may in future generate significant money does not make them commercially viable when there is no connection with the future wealth. The same principle is not applied to development of talent in other styles of music or artforms. Although Creative Scotland have been aware of the threats to the sustainability of this sector for some time, the sector remains virtually unfunded by the organisation.

E. The Call for Evidence offers the opportunity to deliver bold interventions and vitally needed support. In considering these opportunities for sensible investment and support for this sector, Music Venue Trust has considered short and long-term threats to the future competitiveness of Scottish Grassroots Music Venues.

F. Music Venue Trust has identified two key opportunities which are specifically relevant to the remit of this review and would result in appropriate support emerging for Grassroots Music Venues:

- Opportunity 1: Improve the quality of audience and artist experiences through a programme of infrastructure investment
- Opportunity 2: A programme of strategic engagement with GMV's to encourage Open Fund applications for Talent Development Programmes

Opportunity 1: Updating Infrastructure

Sound + Vision is a fully developed and costed plan to improve the performance infrastructure in 101 Grassroots Music Venues across the UK in the next five years, delivering high quality in

every aspect of the sound, lighting, artist and audience facilities and reducing running costs and environmental impact by converting GMVs to high quality, low impact digital equipment. Delivery of this project would significantly boost artist and audience experiences and addresses key elements of existing Cultural Policy.

Sound + Vision is a fully costed five-year proposal with a total project value of £8.35million. Music Venue Trust has already secured £3.6million in matched and in-kind funding from manufacturers and music industry partners. To deliver this project requires a cash investment of £4.75million across five years. It could be achieved through the creation of a specific funding stream within existing Arts Council England and Lottery sources and by the creation of a specific Creative Scotland Targeted Fund, without significant impact upon existing funding demand. Precedent for such an initiative already exists, such as the 2018 grant of £60,000 made to PRS Foundation for Momentum.

Alongside the capital investment programme sits an audience development package for each venue, and the development of a national apprenticeship and training programme. Full details of Sound + Vision are provided in Annex A.

Delivering Sound + Vision would support key outcomes for Grassroots Music Venues:

i. Create 101 world class GMVs in the UK by 2024
ii. Create a UK network of high-quality spaces which has local and regional impact, directly engaging hard to reach audiences in disenfranchised communities - supporting business to grow and driving growth across the whole country
iii. Significantly strengthen the touring circuit and deliver high quality to new and emerging artists and the audiences which support them
iv. Substantially reduce running costs within these venues, creating economic benefits and improving financial resilience which can directly increase payments to artists and supporting staff
v. Increase opportunities for apprenticeships, training, mentoring, with an aim of creating 101 new apprenticeship positions across the UK by 2023

Opportunity 2: Engaging and Connecting with GMVs and encouraging Talent Development Programmes

Historically, there has been a broad failure by key stakeholders to have meaningful discussions with this sector, and this has resulted in low application numbers to Creative Scotland from Grassroots Music Venues.

"Music in GMVs is not seen as being as culturally prestigious as the music in the funded sphere, or other art forms that receive significant funding. Because GMVs so rarely seek subsidy, and more rarely receive it, we are not present at discussions about the cultural agenda, and until recently rarely had conversations with relevant public bodies." - Nick Stewart, Sneaky Petes, DCMS Report on Live Music March 2019

In encouraging Creative Scotland to have conversations with Grassroots Music Venues, they can achieve at least three core aims:

i. Artists and cultural producers core aim: Explore ways in which the vital contribution that artists and cultural producers make to society is visible and valued – with a view to strengthening opportunities for excellence and diversity across the arts to be encouraged, nurtured and sustained across Scotland.
ii. Organisations and sector development core aim: Establish a strong and up-to-date understanding of the different dynamics, operating contexts and business models that exist across the arts in Scotland – with a view to enabling the evolution and sustainability of new ways of working, including through partnerships and collaboration.
iii. Creative Scotland's role core aim: Develop effective, relevant and informed ways of working – with a view to fostering long-term strategic planning and partnership working between the private and public sectors, and across local, national and international contexts, to support an arts sector that is thriving, strong and reflective of contemporary Scotland.

Grassroots Music Venues are experts at spotting and nurturing talent. They are the Research and Development department of the live music industry. However, their resources are now spread too thinly to currently perform this role to its fullest extent:

"You among the last few arbiters of taste. I know there are bands you put on to get people through the door, like tribute acts, but there will be one or two bands you put on every month knowing hardly anyone will come but because you love the bands... It's an important role that you play. You're the people who see the bands before anyone else, the A&R or anybody… People around the industry should wake up to that." - Steve Lamacq, BBC 6Music.

To ensure music venues continue to showcase, promote and pay emerging artists, and to increase the rate at which they do this in Scotland, Creative Scotland should actively engage with Grassroots Music Venues to encourage them to create Talent Development Programmes that feature emerging artists in Scotland.

Talent Development Programmes built around showcasing emerging artists at GMVs allow venues to

i. use their expertise in promoting extraordinary new talent
ii. increase opportunities for emerging artists to perform
iii. ensure that artists are paid fair fees for their performances, a direct challenge to the unfair 'pay-to-play' model

G. This review has the specific remit to consider the effectiveness and impact of the distribution of the available cultural funding. We note, however, that the crisis facing Scotland's Grassroots Music Venues is not the sole responsibility of Creative Scotland. Music Venue Trust has identified two key additional initiatives which are specifically relevant to the needs of Grassroots Music Venues and which we invite the Inquiry to consider:

i. Opportunity 3: Attract Private Investment and secure long-term sustainability
ii. Opportunity 4: Resolve long term financial, legal and sector challenges.

Opportunity 3: Securing Investment

A principle cause of closure of Grassroots Music Venues is the comparative financial returns from the physical bricks and mortar which house these spaces; landlords can achieve higher financial returns from alternative tenants or from conversion to residential space.

Music Venue Trust has created a ten-year plan, Grassroots Investor, which aims to acquire freehold ownership of these buildings and create a protected network of spaces – a 'National Trust for Venues'. Grassroots Investor aligns the intent of the freehold owning landlord, Music Venue Trust, with the leaseholder or tenant, the local GMV operator, creating a supportive partnership where the aim is to maintain a thriving GMV. Music Venue Trust has established a key clause lease which will enable the Trust to provide these spaces to future tenants on the basis of that over-riding objective and has undertaken substantial discussions with key stakeholders.

Creation of a Culture & Heritage Investment Tax Relief: Based upon existing provisions contained with the Social Investment Tax Relief (SITR) and the Social Venture Capital Fund (Social VCT)[28], establishing a specific CHITR would enable MVT to create investor packages to tackle a central issue facing GMVs; the freehold ownership of the buildings.

To support schemes such as Grassroots Investor, Government should establish a new Cultural & Heritage Investment Tax Relief:

I. Referencing directly EU GBER carve-out for state aid in relation to culture and heritage conservation (Article 53 of EU Regulation 651/2014) [29]

II. Adopting social enterprise/asset lock requirement from SITR model to ensure appropriate application of tax relief incentive

III. £5m investment limit over three-year period – in line with EIS and previously stated SITR objective

IV. Maximum investment £20m – culture and heritage conservation is likely to involve acquisition of assets with potentially significant market value, which needs to be reflected in any investment cap

V. Gross assets restrictions may also need to be increased from £15/16m (pre/post) to £25/30m to reflect increase in permitted investment level above

VI. No restrictions on maximum age of company/trading activities or acquisition of existing business, assets, goodwill etc – culture and heritage conservation by definition implies long-term existing activities

VII. Trading activities should be limited to culture and heritage as consistent with Article 53 – this may require some elements of "positive" approach to prescribing allowed activities rather than just identifying a list of "excluded activities", although a combination of both approaches may help with clarification.

Otherwise, rules relating to the investee company should be applied in a similar vein to existing SITR and Social VCT schemes:

I. Social enterprise / asset-lock requirements

II. Investment capital in form of debt or equity allowed – same tax reliefs applicable

III. Requirements in relation to non-listing, independence, control of other companies, partnerships, employees, subsidiaries

IV. Prescribed limits on dividend distributions – per share and per year

V. No restrictions on use of assets as collateral

VI. Ranking of debt and equity at lowest level – but clarity on how this works in insolvency would help

VII. No charges/security allowed on debt and "reasonable, commercial rate" cap on interest

VIII. No pre-arranged exit or risk avoidance arrangements

IX. Requirement to use investment funds within 2 years

X. Payment allowed to directors and management

XI. Annual report to be filed alongside annual accounts to provide transparency.

Similarly, rules relating to the investor should be applied in similar vein to existing SITR and Social VCT schemes:

I. Individual but exclusions relating to employees, partners, paid directors (subject to exception)

II. Investor not allowed more than 30% of share capital, loan capital or voting power

III. Investment capital in form of debt or equity allowed

IV. Same tax reliefs applicable as SITR – 30% deduction on Income Tax, CGT exemption/deferral

V. Minimum holding period of 3 years (equity or debt).

Opportunity 4: Reviewing and Updating Policy, Regulation and Taxation

An overhaul of Government and music industry policy and approaches to this sector with the aim of achieving a light touch approach to compliance and regulation and considering supportive measures in taxation by:

i. Consideration of the provisions of the Live Music Act 2012 [30] (England and Wales) to identify how Scotland might act to remove regulation from Grassroots Music Venues so as to mirror the benefits of that act and avoid market distortion which adversely impacts on the viability and competitiveness of Scottish GMVs within a single touring market.
ii. Clearer direction and guidance to local authorities on the intent of Scottish Government legislation, particularly around the Agent of Change
iii. A national review of the existing premises licenses within this sector, with the aim of removing grandfather clauses and outdated practices and conditions

iv. Establish a statutory right of consultation on planning and development that impacts upon GMVs to mirror that enjoyed by theatres (Statutory consultee Theatres Trust [31])
v. Reform of Business Rates in this sector, with the aim of establishing a sector specific framework for use by the Valuation Office Agency [32]
vi. A review of VAT on ticketing within the Grassroots Music Venues sector to:
    a. clearly understand the impact on investment and talent development from taxation within the sector
    b. consider the appropriate rate of taxation on small venue ticketing (with specific regard to comparison to neighbouring territories and parity with other aspects of the cultural sector [33])
vii. A review of the collection of royalties for live performances within this sector to clearly understand the impact on investment and talent development of collection agencies and methodologies within this sector, with a specific focus on identifying the use of digital collection management tools to limit administration, collection costs and eliminating minimum fees that obstruct the presentation of small scale shows [34]
viii. Underpinning all the above, a drive towards achieving cultural parity with already recognised creative spaces such as theatres, arts centres, galleries, museums etc, resulting in the adoption of the term Grassroots Music Venues within cultural policies, guidance and funding.

Reviewing and updating policy, regulation, taxation and working practices provides a series of 'nudge' opportunities to support GMVs which would have limited cost impact but significant outcomes. Additional work in this area is an effective intervention opportunity which can support the broader aim of cultural parity for our Grassroots Music Venues.

ANNEX A

Delivering a 21st Century live music experience to artists and audiences in every part of the UK

Sound + Vision: The Project and Opportunity

Sound + Vision will improve the performance infrastructure in 101 Grassroots Music Venues (GMVs) in the next five years, delivering high quality in every aspect of the sound, lighting, artist and audience facilities. It is a strategic intervention into the Grassroots Music Venues sector to Relaunch, Reinvigorate and Re-energise the UK's music venues and touring circuit so that we can ensure that high quality experiences are available to a wider and more diverse range of audiences across the UK.

Sound + Vision is a nationally significant project which will demonstrate practically that collaborative, sensible investment into this sector allied to local and national promotion of its activities creates passionately engaged new audiences which are sustainable. It is a completely planned and developed investment project which is ready to be delivered.

Music Venue Trust has built substantial industry partnerships to support Sound + Vision. These partners understand and wish to work together to tackle the underlying issues. They are committed to reinvigorating this sector through a strategic intervention with a focus on audience development that tackles audience perceptions. These partnerships include the UK's leading manufacturers, leading audience engagement organisations and most significant artist agencies. To ensure this project addresses sustainability and access issues, MVT has formed partnerships with Julie's Bicycle and Attitude is Everything.

In creating this project, Music Venue Trust has sought to establish best value practice throughout. We have asked our partners to assist us in maximising the impact of every pound we raise to support this project; every partner in this project is donating time and/or cash of substantial value. For the capital expenditure within this project, we have identified the market leaders in this sector and invited them to become partners in the project. The result of this is substantial investment through reduced costings on all equipment – typically 35.4% lower than market value.

Over the past 3 years the high rate of closures in the grassroots venue sector across the UK has been well documented. The causes of closures are multiple and often complex but have highlighted a long-term decline in the sector with 20 years of under-investment exacerbating other operational problems. This decline presents a unique opportunity to intervene to develop new audiences and to increase cultural engagement.

Increasing usage by 10% across the sector would generate:

- 24,000 additional performance opportunities
- 8,000 additional shows

- £13million in additional ticket revenue.

Increasing attendance by 10% across the sector would generate:

- 24,966 additional audience members every week
- 1,298,267 additional audience members per annum
- £13million in additional ticket revenue.

By permanently improving the quality of infrastructure at each of these venues, Sound + Vision will benefit over 24,000 events and audiences per annum, an improved live music experience reaching in excess of 13million people per annum.

Aims and Outcomes

Our aim in Sound + Vision is to substantially exceed existing audience and artist expectations of quality within this sector. To achieve this outcome, we have:

- sought the latest and most efficient professional equipment from market leader manufacturers
- created partnerships with recognised brands and equipment within music sector, equipment known for reliability
- established buy-in from manufacturers
- established a partnership with the market leader in installation; White Light has a strong reputation for high quality delivery, finish and attention to detail
- ensured that the upgrades and improvements we propose are future proofed and include potential for upgrade and development of resources as venue needs change or venue finances improve.

We will work with Julie's Bicycle and White Light to ensure that all equipment provides the best potential to minimise impact on the environment. Julie’s Bicycle is a leading charity working on environmental sustainability within the arts and creative industries in the UK and internationally. They have been working with Arts Council England on a world-first programme of environmental support for National Portfolio Organisations (NPOs) since 2012. White Light is the complete production solution specialist operating in a range of markets such as theatre, concert touring, corporate events, broadcast, themed attractions, education and trade. Since its formation in 1971, the company has forged a reputation for supplying technical solutions including lighting, audio,

video and rigging to projects of all sizes across the UK, Europe and worldwide. Our partnerships with Julie's Bicycle and White Light includes:

- use of LED lighting technology, reducing venue's own energy consumption, maintenance routines and improving sustainability
- centrally managed preparation of systems at WL's own facility in order to minimise logistics and contact time within each venue
- training and management program to insure venues maximise potential and lifespan of equipment
- the opportunity to share equipment resources between venues, placing value where and when a venue needs it and it can have the most impact.

We will work with Attitude is Everything to establish a specific GMV Charter of Best Practice and support venues to achieve the best access suitable to their venue. Attitude is Everything improves Deaf and disabled people's access to live music by working in partnership with audiences, artists and the music industry. An established independent UK charity, part of Arts Council England's National Portfolio of Organisations, AiE encourage events producers to go beyond the legal obligations set out in the Equality Act and implement best practice, providing a fair and equal service to their Deaf and disabled customers.

By addressing quality, sustainability and access, Sound + Vision will establish a new creative benchmark. Sound + Vision will create local, high quality facilities which encourage a new generation of technical staff to enter the grassroots industry. Those new technicians will receive training which is specifically aimed at quality and best use of latest technical resources. We know that historically, many technicians who have gone on to work in music, theatre and events had their earliest experiences in their local GMV. The relevance of this informal training to a future career is now being endangered by the substandard equipment in use in many GMVs. Improvement across the network will ensure that these opportunities continue to be available to young people, whether they live in a city or not.

To ensure best value, we have adopted a rigorous procurement process for purchasing goods, works and services. Steps taken include:

- procuring equipment directly from manufacturers rather than through distributors
- scale of economy/purchasing power to drive down cost prices
- cost prices achieved with no mark-up
- a simple management fee process which directly limits any potential for overspend

- direct negotiation with manufacturers to lever "buy in" to Sound + Vision in addition to straight forward commercial relationship, exchanging commitments to marketing and brand alliances for vital training and technical support.

By delivering Sound + Vision we will directly

- Create 101 world class Grassroots Music Venues in the UK by 2023
- Create a national network of high quality spaces which has local and regional impact, directly engaging hard to reach audiences in disenfranchised communities
- Significantly strengthen the touring circuit and deliver high quality to new and emerging artists and the audiences which support them
- Substantially reduce costs within these venues, creating economic benefits which can directly increase payments to artists and supporting staff
- Increase opportunities for apprenticeships, training, mentoring, with an aim of creating 101 new apprenticeship positions across the UK by 2023.

By undertaking this work, we will indirectly boost the night-time economy in 101 locations across the UK. Economic assessment of the impact of Grassroots Music Venues undertaken by the Greater London Authority indicates that for every £10 spent within a GMV, £17 of expenditure is generated elsewhere in the night time economy – transport, food, beverage being three key areas which benefit. Increasing usage of these spaces by 10% would result in a £22million boost to the night-time economy.

Budget and Income sources

A full budget for a five-year project has been created and can be provided.

To create this budget, MVT and White Light have identified 11 iconic venues that demonstrate the key elements of the decline we wish to address. Those venues have been surveyed in depth, a full audit of facilities, equipment and usage carried out. These venues will form a pilot project in Year 1 so that the work can be evaluated and monitored throughout the process. We have modelled the impact and undertaken a robust process to demonstrate best value. We have extrapolated from these venues to create a global budget across five years to deliver this project in 101 venues.

Sound + Vision is a £8.35million project. Music Venue Trust has already secured £3.6million in matched and in-kind funding. To deliver this project requires a cash investment of £4.75million across five years.

Arts Council England receive £262million in lottery funding and £343million in Government funding per annum, a total of £605million. Capital funding from ACE equates to £130million per annum, 21% of the total made available to the cultural sector for distribution by ACE. Between 2018 to

2023, ACE is predicted to receive £3billion total funding, making £635million available to capital projects.

If Arts Council England were to create a specific funding stream to address the challenges and issues faced by the Grassroots Music Venues sector, delivering Sound and Vision would equate to only 0.15% of the total cultural funding available and 0.8% of the capital funding envisioned for 2018/23.

Comparisons within the sector:

An example of strategic intervention within this sector already exist at comparative levels. Momentum is a £500,000 per annum specific UK investment programme into new and emerging talent which reaches 40 artists, administered by PRS for Music Foundation under a special arrangement with Arts Council England.

Comparison to other funded sectors

In 2011/12, large and mid-scale performances of opera and ballet by the seven main organisations in receipt of ACE funding:

- reached a total audience of 1.5 million
- delivered 951 performances
- received £70.8million.

Between 2018-23, these seven organisations are projected to:

- receive circa £300million in ACE funding
- deliver 4500 performances
- reach an audience of 7.5million.

By implementing the Sound + Vision proposal, investment in these 101 Grassroots Music Venues in this sector in 2018-23 would:

- receive £4.75million in ACE funding – 1.5% of the investment in Opera and Ballet at national level
- deliver 101,140 performances – 2247% of the performances
- reach an audience of 17million – 227% of the audience.

The sector has attracted comparatively low investment from cultural funding sources:

- less than 3% of the sector has received any funding at all in the last ten years
- less than 1% of GMVs below 500 capacity reported any investment in 2015/16.

As a result of the failure to identify investment across a prolonged period, the equipment at these venues is:

- largely analogue
- out-of-date and environmentally damaging
- expensive to maintain

ANNEX B – Support for Grassroots Music Venues

Cross Party Support for Grassroots Music Venues:

"We have a real crisis in the system. We are haemorrhaging small music venues - not just in London, but across the whole of the country. We really need to wake up to that and do something about it." – **Michael Dugher, Shadow Culture Minister**, Oct 2015

"*A vibrant music venue which is breaking new acts has just as much right to be considered a cultural venue as a local or regional theatre*." – **Ed Vaizey, Culture Minister**, Oct 2015

"We need to ensure that any available funding acts directly to improve the infrastructure in those venues so that they are attractive places for touring artists to play and for audiences to be in." – **Lord Tim Clement Jones**, House of Lords, Jan 2016

"There is now a need to rebuild Grassroots Music Venues and invest in new talent so that all parts of the industry can return to full health." - **Lord Foster of Bath**, House of Lords, Jan 2016

"I am delighted to support the work of the Music Venue Trust. Like hundreds of thousands of people in this country, I love watching live music and visiting venues large and small. We have world class music venues right across the UK that grow and nurture our amazing talent. These venues also provide huge benefit to the local economy as well as the obvious cultural benefit. Unfortunately, many venues are facing challenging times whether it is local authority planning and licensing issues or broader challenges and I am more than happy as a patron of the Music Venue Trust and Chair of the All Party Parliamentary Group on Music to continue to champion this brilliant cultural sector." - **Nigel Adams MP (Conservative)**, Sept 2016

"The establishment of the Music Venue Trust comes at a critical time. There has been a worrying decline in small music venues and the irreplaceable loss of classic venues, such as the Bull & Gate in Kentish Town. Just recently in Bristol, there are signs that Government changes to permitted development rights to change use of buildings from commercial to residential are causing problems for some of the city's best-loved venues. Small venues have always played a fundamental role in breaking and nurturing new music – their survival is important for ensuring that successful bands continue to emerge from the grassroots (from "a bunch of guys" getting together with "some shitty old instruments", as Dave Grohl puts it), and not just from the X-Factor or the BRIT school. They also help maintain Britain's thriving and diverse alternative music scenes, for those bands that may never play to larger audiences. But critically, they also help sustain the cultural scenes and creative economies of many towns and cities, creating employment and attracting people into city centres. I am very pleased to help support the work of Music Venue Trust in its innovative plan to help small music venues to carry on, as part of a protected network." - **Kerry McCarthy MP (Labour)**, Mar 2014

"I am delighted to have been asked to be a patron of the Music Venue Trust. Small venues are the bedrock of live music industry and the incubators of new talent. My Live Music Act was designed to

clear away some of the red tape tape which surrounds them but if they are allowed to disappear it will all have been in vain. The Music Venue Trust is the start of the preservation fightback."- **Lord Tim Clement-Jones (Lib Dem)**, Mar 2014

"Live music is always a unique experience, and small venues are absolutely crucial for growing and nurturing new talent – and as more intimate settings for more established artists. Glasgow is one of UNESCO's global cities of music, and the sector is an important part of the economy as well as our famed cultural and creative scene. MVT has an important role to play in protecting and supporting live music venues, and I look forward to working with the Trust and cross-party colleagues in Parliament to make sure we maintain and develop venues in Glasgow and across the country." - **Patrick Grady MP (SNP)**, Jan 2017

Artist Support for Grassroots Music Venues:

Sir Paul McCartney: ***"****Throughout my career I've been lucky enough to play in venues of all different shapes and sizes, from tiny clubs to massive stadiums all over the world. Without the grassroots clubs, pubs and music venues my career could have been very different. I support Music Venue Trust because artists need places to start out, develop and work on their craft and small venues have been the cornerstone for this. If we don't support live music at this level then the future of music in general is in danger."*

Neil Hannon, The Divine Comedy: ***"****It is my honour, indeed duty, to be a patron of the Music Venue Trust. Right now bands and artists are more reliant on live music to build and support their musical careers than ever before. Small venues are where most musicians start their careers, develop their songs, and first connect to their audiences. They are our superstar nurseries and as such are absolutely vital to the future success of live music in the UK and Ireland. We all know the problems small music venues are facing, every month seems to bring the news that we've lost another icon of the music scene to developers, planning issues or due to declining audiences. But perhaps with proper support and investment we can protect the venues that we have left, and ensure they can start many more bands and artists on a path to success."*

Frank Turner: ***"****I've made my career playing live in music venues, which were also the place where I found my passion as a kid. Music venues are the locus of our corner of culture, a vital part of our world and a great contributor to our economy. It's as important to look after the smaller end of the scale as the larger, and the Music Venue Trust plays a great role in defending them. I'm happy and proud to be a part of it."*

Savages***:*** ***"****There are many great small rooms in this country who do great work with limited resources, and they should be applauded and supported. There are also great bands, great musicians and great audiences who love music and deserve the best. It definitely seems a shame that when you ask musicians around the world about the touring conditions in the UK, backstage, PA system quality… you don't get a more positive response. I come from years of touring the UK and experiencing the worse and the best, it isn't a secret for anybody: there is still progress to be made.*

The music industry can definitely affect a change. Labels, managers, big promoters, booking agents, artists and bigger live venues can group together and start to repair the UK's reputation in live music by supporting initiatives like the Music Venue Trust."

Enter Shikari: *"Salient points regarding Enter Shikari and its position on "small venues":*

1. *Enter Shikari cut its teeth playing small venues the length and breadth of the UK over a period of 2 years+, so knows from whence it speaks.*

2. *Small venues are the bootcamp that prepares a band for taking on the bigger venues and festival stages that hopefully make up its live future.*

3. *Enter Shikari strongly believes the UK music industry should do more to support small venues.*

4. *Enter Shikari is proud to add its name to the list of patrons of Music Venue Trust.*

Jeremy Pritchard, Everything Everything: *"Were it not for presence of the Tunbridge Wells Forum while I was growing up, I very much doubt that I would be a professional musician now. The same would be said of countless other individuals who have been inspired and nurtured by similar community live music venues – Southampton Joiners, Bristol Thekla, Oxford Jericho, Manchester Night and Day, Hull Welly, Newcastle Cluny, etc. The UK music industry needs to do more to support its live grassroots, and Government needs to recognise that the health and future prosperity of this important British Industry relies on us nurturing these seeds. Very often the commercial value of the property outweighs its commercial value as a music venue, but never its social or cultural value, which is what the Trust aims to protect."*

Andy Dunlop, Travis: "*These classic little venues dotted around Britain are the Petri dishes in which British music was cultivated over the last half century. To see them disappear would be a crime and in an age where all our town centres are becoming increasingly indistinguishable, we would be denying future generations an independent and individual place to experience live music. They are every bit as important to our cultural heritage as any country house and fundamentally, still provide a cultural service. It's great that the Music Venue Trust has stepped in to do something to protect them."*

Links to articles of interest:

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http://musicvenuetrust.com/2015/10/music-venue-trust-on-bbc-news-at-6-19th-oct-2015/

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http://www.m-magazine.co.uk/news/sir-paul-mccartney-throws-weight-behind-grassroots-venues/

http://www.bbc.co.uk/newsbeat/article/37699604/small-music-venues-are-still-not-being-valued-in-the-way-they-should-be

http://www.huffingtonpost.co.uk/tim-arnold/what-route-can-music-take_b_12287112.html

http://www.mirror.co.uk/news/uk-news/mourning-glory-last-orders-hundreds-8802616

ANNEX C: Scottish Music Venues Alliance Members

VENUE	TOWN/CITY
Assembly (The)	Aberdeen
Krakatoa	Aberdeen
Lemon Tree (The)	Aberdeen
Fury's	Ayr
Bar 15	Dundee
Church	Dundee
PJ Molloys	Dunfermline
Bongo Club (The)	Edinburgh
Henry's Cellar Bar	Edinburgh
La Belle Angele	Edinburgh
Leith Depot	Edinburgh
Mash House (The)	Edinburgh
Potterrow	Edinburgh
Queens Hall (The)	Edinburgh
Scottish Storytelling Centre	Edinburgh
Sneaky Pete's	Edinburgh

Stramash	Edinburgh
Subway Cowgate	Edinburgh
Summerhall	Edinburgh
Voodoo Rooms (The)	Edinburgh
Whistlebinkies	Edinburgh
Warehouse	Falkirk
Galashiels Volunteer Hall	Galashiels
Glad Cafe CIC (The)	Glasgow
Audio	Glasgow
Blue Arrow Jazz Club	Glasgow
Broadcast	Glasgow
Drygate	Glasgow
Hug and Pint (The)	Glasgow
Ivory Blacks	Glasgow
King Tuts Wah Wah Hut	Glasgow
Nice N Sleazy	Glasgow
Oran Mor	Glasgow
Saint Luke's	Glasgow

Sub Club	Glasgow
SWG3	Glasgow
Hawick Town Hall	Hawick
Tooth & Claw (The)	Inverness
Kelso Tait Hall	Kelso
Backstage	Kinross
Sound Archive (The)	Orkney Islands
Bungalow Bar (The)	Paisley
Old Swan Inn	Paisley
Paisley Arts Centre	Paisley
Inchyra Arts Club	Perth
Mac Arts	Scottish Borders
Selkirk Victoria Halls	Selkirk

ANNEX D: Grassroots Music Venue Definition

DEFINING GRASSROOTS MUSIC VENUES (GMV) - CULTURAL AND SOCIAL ROLE

We define the cultural and social importance of a grassroots music venue (GMV) by testing its reputation, role and activity against six criteria:

1. The elephant test

Everybody in the town/borough/city thinks that is the grassroots music venue.

2. Focus on cultural activity as its main purpose and its outcomes

The venue's raison d'être is the music it programmes.

3. A pattern of relationships and specialised knowledge related to music displayed in a person/team actively seeking to programme cultural activity

An organisational focus on music. Other ancillary services (alcohol, food, merchandise) subsidiary or dependent upon music activity.

4. It takes risks with its cultural programme, and that risk taking is the ignition system of the engine that is the UK music industry.

Programs artists that deserve audiences with no expectation of direct financial reward; as a result of this loss-making activity, significant economic returns become available to the UK music industry.

5. A Beacon of Music and key generator of night time economic activity

The presence of a grassroots music venue (or venues) provides a central beacon of music activity that inspires towns/ boroughs/cities to be musical, and the absence of one causes a dearth of music activity. By programming and reputation, GMVs attract audiences who add significant value to other aspects of the night time economy (restaurants, pubs, bars, clubs, transport).

6. Plays nicely with others

Occupies an important role within its local community and is open to further networking.

A Grassroots Music Venue displays some or all of these characteristics, dependent upon factors such as location, economic climate, or seasonal variations.

DEFINING GRASSROOTS MUSIC VENUES (GMV) - ECONOMIC ACTIVITY

We use capacity, activity, employment and financial return to seek to categorise GMVs in three bands:

SMALL GMV:

- less than 350 capacity
- over 144 live music events per year, providing opportunities for more than 180 micro-businesses (bands)
- entry level musicians, some limited activity in established acts
- 3 to 10 direct FTE jobs (programming, lighting, sound, bar, security etc)
- significant number of unpaid roles/volunteers
- high running cost to capacity ratio
- little if any profit potential

MEDIUM GMV:

- 351 to 650 capacity
- over 96 live music events per year, providing opportunities for more than 144 micro-businesses (bands)
- mix of new and established acts
- 5 to 15 direct FTE jobs (programming, lighting, sound, bar, security etc)
- some unpaid roles/volunteers
- medium to high running cost to capacity ratio
- propensity to programme non-live music (such as club nights) to support live music programme
- limited potential for profit

LARGE GMV:

- 651 plus capacity
- over 72 live music events per year, providing opportunities for more than 108 micro-businesses (bands)

- programme of mainly established acts
- 10 to 20 direct FTE jobs (programming, lighting, sound, bar, security etc)
- internships and apprenticeships
- may be profitable dependent upon external factors (location, additional uses, ownership)

These bands and activities are flexible. Final definition of a GMV within these bands should include variable factors such as location, economic climate, competition, or programming.

DEFINING GRASSROOTS MUSIC VENUES (GMV) – AMENITIES & INFRASTRUCTURE

1. Has a fixed or temporary stage, or as a minimum an area defined as a stage, and exhibits at least one other structural hallmark conducive to live music, such as:

Defined audience space, sound booth, ticket hatch, sound proofing, room adapted to enhance acoustics, stage facing or elevated seating, dressing room, photo pit, external poster frames for advertising gigs, overnight band accommodation

2. Possess a mixing desk, PA system, and at least one other piece of equipment to facilitate live music, such as:

Stage monitors, lighting rig, drum kit, back line, stage microphones, stage box & snake, spare instruments, instrument consumables, signal processors, recording rig, smoke machine

3. Employs or otherwise utilises at least two of the following (they may be the same person):

Sound engineer, booker, promoter, cashier, stage manager, security personnel

4. Applies a cover charge to some live music performances and incorporates promotion within its activities, such as:

Publishes printed or electronic gig listings, issues printed tickets, utilises on-line ticketing, produces displays and distributes posters, advertises gigs involving original music via local media

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[2] http://musicvenuetrust.com/music-venues-alliance/

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[4] http://www.bbc.co.uk/newsbeat/article/34571762/music-venues-in-the-uk-have-reached-crisis-point-says-london-club-owner

[5] https://www.london.gov.uk/what-we-do/arts-and-culture/music/saving-londons-music-venues?source=vanityurl

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[8] Music Venue Trust GMV Survey 2016

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[15] http://www.live-dma.eu/wp-content/uploads/2016/07/Live-DMA-data-2014-survey-presentation-for-online-publication-version-18-July-2016.pdf

[16] http://www.livemusikkommission.de/foerderprogramme-zur-technischen-erneuerung-der-auffuehrungstechnik-von-musikclubs-starten-2017/

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[26] http://musicvenuetrust.com/2016/10/music-venue-trust-presents-sound-vision-2017/

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[28] https://www.gov.uk/government/publications/social-investment-tax-relief-factsheet/social-investment-tax-relief#social-venture-capital-trust

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