Birmingham Live Music and Brexit

Report I

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Birmingham Live Music Project

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About this report

This document is the first in a series of reports produced through on-going, collaborative research being undertaken at Aston University, Newcastle University and Birmingham City University. The research seeks to explore the ways in which the live music ecology of Birmingham is constituted and how the sector is approaching challenges related to local, national and international change. Specifically it will explore how those challenges are being managed at a local level, and whether any coping strategies identified within the Birmingham live music sector could be applied to other urban areas. This first report is based on a workshop held at Aston University on 7th May 2019, which gathered together a number of stakeholders from the Birmingham live music sector to discuss and document perceived challenges, threats and opportunities related to the UK government's approach to Brexit negotiations.

About the researchers

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Dr Patricia Correa Vila, a lecturer in Politics and International Relations at Aston University. She acted as an advisor on the BLMP workshop on 7th May 2019. Her main research focuses on political parties: organization, competition, and activism.

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Birmingham live music and Brexit

Report

Since the 2016 EU Referendum result and the subsequent negotiations regarding the UK's exit from the European Union there has been considerable uncertainty across numerous sectors about the potential benefits and problems, which they may experience in any of a number of 'post-Brexit' scenarios. The UK's music industries comprise one such sector, with the question of any potential fallout from Brexit not only haunting a number of analysts, but also raising concern amongst a wide range of live music industry stakeholders (e.g., bands, promoters, venues and their crews and owners) and the local authorities who grant the corresponding licenses or funding for their activities. These concerns are being exacerbated by the UK Government's lack of progress to date in negotiations following the 2016 EU Referendum result, and the growing anxiety around future provisions such as touring activity, work permits, and also visa regimes for inviting artists and their crews to perform and work in the UK. There has been a good deal of coverage of Brexit, and an increasing amount of research on the subject. Much of this has either looked at the economic and political factors leading up to it[1] or the potential broader economic consequences of leaving the EU.[2] Work on and by the cultural sector has discussed attitudes to Brexit[3] and the potential effect of Brexit on cultural production at large.[4] This has included overall assessments produced by the sector itself (including voices from Birmingham and the West Midlands), and of course the government's own (redacted) impact assessment[5] a 'Creative Industries Sector Report' that was widely criticised for leaving out voices from the sector itself and for other oversights, including the role of freedom of movement in the creative industries successes to date.[6] Although more detailed, Parliament's Digital, Culture, Media and Sport Committee inquiry and report into 'The potential impact of Brexit on the creative industries, tourism and the digital single market' also looked mainly at the national picture, and the creative industries at large.[7]

This report, in contrast, focuses specifically on Birmingham and its music industries. As such, it aims to begin adding detail to those broader national and sectoral perspectives and to work towards an assessment of the localised consequences of fluctuations within a globalised music industry brought about large-scale policy shifts like Brexit, and their international ramifications. In that sense, this report's key concerns are the potential direct and indirect effects of Brexit on the live music sector in Birmingham.

[1] For example: Los, B., McCann, P., Springford, J. &Thissen, M. (2017) 'The mismatch between local voting and the local economic consequences of Brexit', *Regional Studies*, 51:5, 786-799. https://doi.org/10.1080/00343404.2017.1287350

The report is based primarily on information collected during an event which took place on 7th May 2019, at Aston University - co-organised with Birmingham City University (BCU) - titled 'The UK Live Music Industry in a post-Brexit era'. It was a one-day event consisting of stakeholders (industry, academia, policymakers, media and culture practitioners). Beginning with a closed workshop in the morning, three talks and a panel discussion followed in the afternoon session, which was also open to students, academics, and the general public. The main goal of the event was to map broad areas of concern related to Brexit and its potential effects on live music in Birmingham.

In order to begin unpacking those areas of concern, workshop participants were broken into working groups containing 4-6 people for discussions around perceived and anticipated problems related specifically to their respective organisations. Some participants represented larger organisations (for example, the Musicians Union Midlands office or Town Hall & Symphony Hall Birmingham), whilst others represented smaller local interests including venues, promoters and cultural organisations (for

[2] See, for instance, the work of the LSE's Centre for Economic Performance:
Datta, N. and Dhingra, S. (2018) *Local Economic Effects of Brexit: Factsheet*.
http://cep.lse.ac.uk/pubs/download/is04.pdf
Levell, P., Menon, A., Portes, J. and Sampson, T. (2019) *The Economic Consequences of the Brexit Deal*.
http://cep.lse.ac.uk/pubs/download/brexit12.pdf

[3] McAndrew, S., O'Brien, D. and Taylor, M. (2019) 'The values of culture? Social closure in the political identities, policy preferences, and social attitudes of cultural and creative workers', *The Sociological Review*.
https://doi.org/10.1177/0038026119871401

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

[5] HMG (2017) *Creative Industries Sector Report*.
https://www.parliament.uk/documents/commons-committees/Exiting-the-European-Union/17-19/Sectoral%20Analyses/10-Creative-Industries-Report.pdf

[6] Romer, C. (2017) 'Government releases Brexit 'sector analysis' on Creative Industries', *Arts Professional*, 21 December.
https://www.artsprofessional.co.uk/news/government-releases-brexit-sector-analysis-creative-industries

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

example, the Birmingham Music Archive or Hare and Hounds Pub[8] Before reporting back to the plenary workshop, the chaired, individual group discussions were asked to map specific areas of concern for participants across a matrix comprised of two main axes that referred to issues of Higher and Lower Priority (HP-LP) and Higher and Lower Difficulty (HD-LD).

These are working labels that are themselves, fluid and variable. One purpose, as well as driving discussion, was to provide a toolkit to begin unpicking the large number of entangled and related concerns whereby international, national and local matters intersect. Thus, the labelling of issues along the 'priority' and 'difficulty' axes partly reflected participants' sense of what they were in a position to do about them.

The diagram below provides illustrative examples of how the large range of concerns raised varied across their perceived salience, the degree to which it was felt they could be addressed locally and then, within that, the relative capacity of local stakeholders to address the problem.

Thus, for instance, a general drop in consumer confidence, widespread issues with recruiting skilled employees and the overarching cultural effects of Brexit have an impact locally but are difficult to address in Birmingham and the West Midlands specifically without reference to the broader national picture. Consequently they are less of an immediate priority for local stakeholders than similarly thorny problems related to production companies in the area, the locally felt effects of a decrease in music tourism and the knock on consequences of this for the city's musical life.

The more immediate prospects for Birmingham and Midlands festivals were also a high priority, alongside a perceived lack of clear and consolidated information about how to deal locally with Brexit's effects on the live music sector on the region and the scope for making regional music sector concerns (as well as live music at large) more visible within the wider discussion of Brexit. These were concerns, however, that it seemed might be more directly or easily addressed by businesses and individuals in and around Birmingham.

Alternatively, issues around warehouse space, the Digital Single Market and the problems faced by the civil service at Westminster in coping with the demands of Brexit are not immediately 'difficult' for local participants, because they cannot tackle them head-on, even if a broader civil service logjam still affects the picture in Birmingham. The more direct consequences of such effects percolate through to the higher difficulty matters such as music tourism for the region or those priorities that are closer to hand, like protecting local festivals.

[8] Some names of participants and their organizations have been withheld in order to comply with GDPR regulations.

Illustrative Brexit-related areas of concern for Birmingham live music

Lower Priority/Higher Difficulty

- drop in consumer confidence
- skilled employee recruitment in a post-Brexit era
- cultural pushback effects from Brexit

Higher Priority/Higher Difficulty

- future of the high number of production companies in the Birmingham area
- a decrease in music tourism
- chilling effect on the city's musical life

Lower Priority/Lower Difficulty

- warehouse space and supply chains
- the future of the Digital Single Market
- lack of civil service bandwidth to address other concerns

Higher Priority/Lower Difficulty

- the summer festival season in 2020
- communication and flow of information about responses to Brexit
- regional and sectoral voices in the wider Brexit discussion

In the sections that follow the concerns raised by participants are highlighted in bold text. The authors have provided additional information regarding participant choices where it was available to help contextualise those for the reader, but the fluid and rapid nature of the discussion meant that this additional context was not always provided. The general uncertainty about Brexit meant the participants could not, with clarity, mitigate and indeed, even articulate, all future problems. As such, the issues discussed in this report are by no means exhaustive. Similarly, the allocation across the 4-part matrix is not presented as a mean of fully prioritising or categorising those issues. Rather, it is seen as a starting point for further discussion within the sector and beyond. We hope to add nuance to this model as we develop it into the future. The allocation nevertheless provides a useful snapshot of the many and varied concerns that exist within the local live music ecology, by which we refer to the participants in the various music scenes in Birmingham, but also the other contextual actors and factors which have a bearing on live music production and consumption in a given locality (including policymakers, council officers, and funders, amongst others).[9]

[9] For more background on the concept of the live music 'ecology' see:
Behr, A., Brennan, M., Cloonan, M., Frith, S. and Webster, E. (2016) ' Live Concert Performance: An Ecological Approach', *Rock Music Studies*, 3:1, 5-23.

Key observations

A number of concerns voiced by Birmingham based stakeholders are similar to those at the national level and include: the uncertainty linked with Brexit, a drop in consumer confidence, or worries about Britain's future relationship with the Digital Single Market.

However, a number of issues are more specific to the local level. These will be discussed in more detail below. The list includes:

- Worries and issues related to the upcoming summer festival season 2020 and how it will affect some of the major festivals in the city.
- Lost opportunities due to disrupted supply chains and insufficient storage space for live music supply chain logistics in the region, for example staging and catering.
- Relatedly, the future of the high-end production companies located in the Birmingham area.
- Skilled employees' recruitment in the post-Brexit era creative industries.
- Reputational damage to the UK caused by Brexit and, linked to this, a decrease in music tourism (worth an estimated £253 in 2016 and, already decreased, £211 million in 2018 to the West Midlands region overall according to UK Music)[10] and risks to that valuable source of revenue.
- Related to that reputational damage, participants raised concerns over what they termed a 'cultural pushback' or the long-term 'cultural effects' of a worst-case scenario Brexit that could lead to a stagnation of the city and its music in terms of its perception on the continental or global stage.
- Massive administrative costs for both Birmingham based bands, many of whom are smaller acts, and also for venues and promoters inviting bands from the EU to play in spaces with a capacity of 500 or fewer.
- A strong feeling that there is a lack of reliable and sustainable information related to Brexit and its effects on the sector, underlining the importance of fluency in structured knowledge exchange processes.
- A lack of debate and due consideration about the live music industry within Brexit negotiations, but, at the same time, also a lack of civil service bandwidth to deal with other issues, leading to a variety of perceived opportunity costs.

In the following sections, we delve a little deeper into the above concerns, beginning with a detailed exploration of the main concerns stakeholders raised. We then attempt to contextualise these concerns through a broader discussion of how the local live music sector relates to the wider economy of Birmingham, and the place of that economy in national and international context.

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[10] UK Music (2017) *Wish You Were Here 2017: The Contribution of Live Music to the UK Economy*, p. 18. https://www.ukmusic.org/assets/general/Report_WYWH_17.pdf; UK Music (2019) *MU5IC BY NUM8ERS 2019,* forthcoming (20 Nov 2019)

What are the main areas of concern related to Brexit (and afterwards) for the live music sector in Birmingham?

The live music industry in Birmingham experiences most of the main challenges that pertain nationally, including those linked to future market uncertainty and an expected increase in the cost and difficulty of administrative processes. However, and as is explained in more detail later on, participants raised some specific issues that have warrant deeper exploration. Specifically, it was noted that the national-level industry responses, in their focus on the bigger picture, would benefit from greater inclusion of regionally specific concerns. Of necessity, representing musicians or music businesses nationwide pushes stakeholders towards a concentration on overarching matters (such as freedom of movement, UK residence status and social security arrangements).[11] But, the contexts in which these matters are experienced – and in which responses will need to be deployed – vary from city to city, and region to region. There were related anxieties about how – more broadly – an anticipated reduction in the UK's 'cultural standing' abroad may trickle down and negatively impact the local sector; participants voiced concern that the UK may be viewed as less inclusive, more insular, and that this was likely to lead to fewer touring acts visiting the city, and also local artists reaching an overseas audiences. While this is clearly a national issue, local responses may need to be specific, requiring some consideration of how to manage these within, and across, different cities and regions.

Uncertainty with regards to Brexit is one of the key challenges identified at a national level (for example, in a recent Guardian article over live music).[12] These too are being experienced at a local level and manifest in particular concerns highlighted by participants. In particular, Brexit ***uncertainty is leading to a drop in the consumer confidence***. The sale of concert tickets – and particularly those with longer sales cycles that sometimes go on sale several months before show dates – are moving more slowly due to the ongoing uncertainty that participants felt is a contributing factor in

[11] For example: UK Music (2019) *UK Music Guidance in the Event of a No Deal Brexit*. https://www.ukmusic.org/policy/brexit/uk-music-guidance-in-the-event-of-a-no-deal-brexit/

[12] Snapes, L. (2019) 'No-deal Brexit may make touring Europe 'unviable' for UK artists', *The Guardian*, Oct 3 https://www.theguardian.com/politics/2019/oct/03/no-deal-brexit-may-make-touring-europe-simply-unviable-for-uk-artists people being less willing to spend money on future events. Although higher-profile acts are less exposed to this uncertainty, this problem is felt keenly with regards to up-and-coming and less well-known acts. This issue is compounded by the responses of artist managers and agents, who have reacted to the broader climate of uncertainty by becoming increasingly risk-averse (and are now much more likely to ask for fixed fees over a percentage of sales). Local venue operators and promoters (large and small) have also perceived a drop in the efficacy of social media marketing to audiences given alterations in how promotional posts now reach (or don't reach) potential audiences. The feeling amongst local stakeholders is that these issues will only become more difficult to manage should Brexit go badly. This places local venues and promoters in a difficult position as they have to underwrite the success (or otherwise) of shows, while already dealing with licensing, planning and the pressures from local authorities on venue operators, which, in turn, impact promoters, artists, managers, PRs, and venue suppliers.

The extent to which the UK will remain within certain regulatory structures is another source of uncertainty. A concern here is the potential for a degraded ***relationship between the UK and the Digital Single Market*** (of very high importance at the national level, but less of a priority concern at the local level insofar as respondents are less able to address it directly). It appears likely that, at the very least, the UK will have a reduced capacity to influence the development of the regulatory regimes that are highly significant to its music businesses. This is not just a matter for the recorded music sector. With downloads and streaming forming a major part of the contemporary music ecosystem, and many new acts gaining a following via YouTube and other online platforms, the digital realm is vital to the development of fan-bases for touring abroad and inward bound audiences. It is felt that curtailment of the UK's involvement in the Digital Single Market will further drive a wedge between UK bands and potential international fans.

Moseley Folk Festival 2019, B13 8DD

Another interesting insight from the workshop was that ***the summer festival season of 2020*** is identified as one of the main worries in the sector. Given the uncertainty around Brexit, it is hard to predict what the potential costs of running events of such scale may be in order to plan for any potential losses linked to those costs. Resolving the issue of costs is not a difficult one for the sector, since there are mechanisms in place to mitigate known costs. Yet the uncertainty around Brexit makes these costs unknown and - given that the 2020 festival season is approaching – the issue a high priority. In the case of Birmingham in particular, this puts extra strain on the organisers of events such as the Moseley Folk and Arts Festival (August), and Beyond the Tracks (September). Festivals are a particularly acute case of the logistical issues surrounding touring acts, which - as with many other businesses - are reliant on just-in-time supply chains. It is felt that ***disruptions and delays at UK and EU borders would create lost opportunities***.

Given also that ***the UK has a shortage of warehouse space***,[13] previously mitigated by the move to just-in-time supply chains, the cost of storing items delayed by disruptions to just-in-time mechanisms is likely to increase. Further, much of the total warehouse space will be taken up by major importers such as supermarkets. The law of supply and demand would suggest then that the remaining space may become prohibitively expensive for smaller firms, particularly if dealing with bulky items such as those held by touring bands.

Focusing on Birmingham more specifically, a prominent local concern is the future of ***the high number of production companies located in the Birmingham area***. These are companies handling matters related to lighting, staging and tour management. The region hosts three major companies: MCL Create (B38 8SE), SSE Audio: West Midlands (B98 9PA), and Cloud One Group Ltd (B7 4EE).

These companies are major employers in the region and are a route into the industry for younger people. The UK is often a staging post for international acts touring the EU and should services such as this relocate to cities with better access to EU markets – such as Dublin - then the jobs and opportunities associated with those services will go with them. The Creative Industries Policy Centre, led by NESTA, further reports that when it comes to the West Midlands 29% of businesses linked with creative industries employ non-UK nationals, which raises further worries about ***the recruitment of skilled employees in a post-Brexit era***.[14] The issue

O2 Institute, B5 6DY, capacity 2,850

[13] Butler, S. (2019) 'UK warehouse space nears capacity as firms stockpile for Brexit', *The Guardian*, Jan 21. https://www.theguardian.com/politics/2019/jan/21/uk-warehouse-space-nears-capacity-firms-stockpile-for-brexit

[14] Bakhshi, H., Spilsbury, M. (2019) *The Migrant and Skills Needs of Creative Businesses in the United Kingdom. Findings from the January 2018*. Creative Industries Policy and Evidence Centre, p.22 https://pec.ac.uk/assets/images/The-Migrant-and-Skills-Needs-of-Creative-Businesses-in-the-United-Kingdom-REPORT.pdf was of a high difficulty for the participants in the local context, but not something that they could address immediately.

The promotion of new bands was one of the other factors identified during the workshop. Stakeholders indicated that smaller, lesser-known bands coming from Europe - unless they get additional funding - will be less likely to tour in Britain. Despite this worry, there was nevertheless a recognition that this may have some limited positive short-term outcomes for grassroots UK acts, who may benefit from the increased opportunities to play to UK audiences. Any gains on this front, however, could be significantly offset by the increased financial and administrative burdens placed on UK acts – especially smaller acts – seeking to tour in Europe.[15] Furthermore, this short-term effect is countered by concerns over the long-term effects of what the workshop described as ***the 'cultural pushback' the UK may experience over time***. If the country is perceived to be more inward-looking, the likelihood of UK acts getting opportunities to perform overseas, and for overseas acts to tour the UK, may decrease. Indeed, fears over the decreasing interest in foreign artists may already be disincentivizing venues and promoters from hiring those acts.

This is bound up with the worries mentioned above about ***the increased cost and difficulty regarding new/additional administrative processes (visas, etc.)*** required for gigs post-Brexit for both UK based touring acts and inward bound musicians. One of the immediate consequences could be a drift towards more homogenized events. Thus, the *cultural* effects of Brexit, through creating a less diverse and interesting scene through the decrease in cultural exchange, can potentially be considered a disaster, leading to ***stagnation in the city's cultural and musical life***. This a particular long-term worry when considering the potential cultural influences on, and inspirations of, young people. How will bands, DJs, or other performers be inspired to develop their work if the city does not have a diverse and creatively interesting multiplicity of acts passing through it?

There is a further tangible but immeasurable cultural effect of the reputational damage of Brexit on the UK. The rhetoric surrounding the 'Leave' campaign included a toxic strand that focused on immigration. This may well have made the UK a less attractive prospect for potential visiting fans. Combined with the issue of fewer bands coming to the UK and the associated increase in the number of

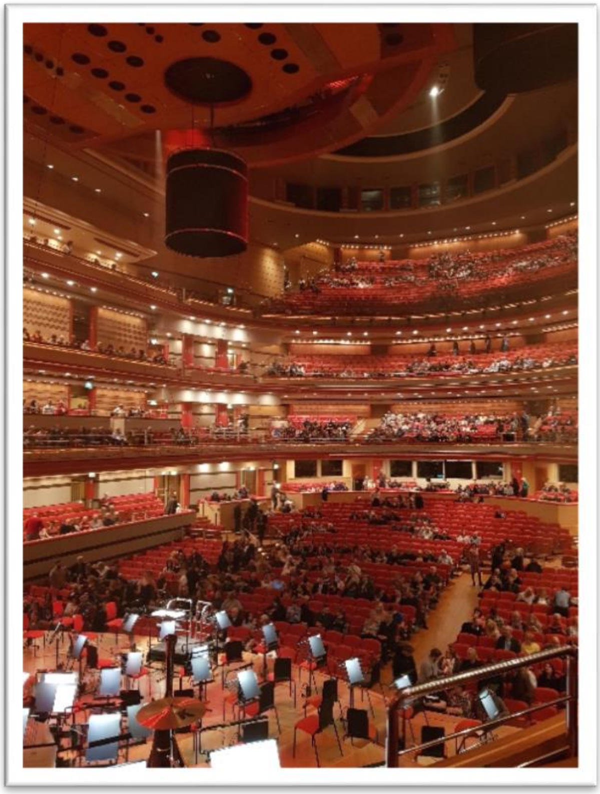
[15] See, for example:
Rozbicka, P. and Conroy, M. (2018). *Brexit and the UK Live Music Industry*. Written evidence to the DCMS Live Music Inquiry 2018. (LMU0077)
http://data.parliament.uk/WrittenEvidence/CommitteeEvidence.svc/EvidenceDocument/Digital,%20Culture,%20Media%20and%20Sport/Live%20music/Written/82216.html
Snapes, L. (2019) 'No-deal Brexit may make touring Europe 'unviable' for UK artists', *The Guardian*, October 3.
https://www.theguardian.com/politics/2019/oct/03/no-deal-brexit-may-make-touring-europe-simply-unviable-for-uk-artists

opportunities for continental European fans to see bands in other EU countries, this could lead to a marked ***decrease in the number of tourists visiting the UK specifically to see musical acts***. UK Music calculated that, in 2016, there were 12.5 million music tourists in the UK, including 823,000 overseas music tourists with an average spend for overseas music tourists of £850 and including 107,000 visits to smaller venues.[16] The appeal of local events, festivals and venues to domestic and international tourists alike is, of course, closely connected and subject to similar pressures. According to UK Music's figures, 904,000 music tourists overall generated £253 million in direct and indirect spend in the West Midlands in 2016, supporting 3,504 jobs in the region. In 2018 numbers dropped to 738,000 music tourists leaving £211 million. Risks to these resources, driving domestic and foreign visits could have a series of chain reactions affecting not only live music but cultural, touristic and service related businesses at large (e.g., transport). Participants felt that not only would music tourism and the associated employment come under threat, but so also would any potential local and inward investment based on that existing success, thus leading to a stagnation or decline within the region.

In a similar vein, and as mentioned briefly above, Brexit may also affect the UK being used as a 'stepping stone' for international acts. The increase in administrative costs, coupled with a lack of resources and falling investment, would make Birmingham a less attractive proposition for such activities, and particularly for US acts embarking on large-scale European tours with English-speaking crews picked up in the city. Participants described how a lot of their work in the live music industry is based on goodwill and maintaining positive relationships with agents. Reassuring such participants in the transnational aspects of the live music business that 'we know what we're doing' is crucial for local actors. As such ***the lack of available information or guidance on how to maintain or replicate the status quo*** of current and future relationships is a concern, and the mitigation of that issue a high priority. As one participant put it, a key quality they need to display to agents and other stakeholders is a sense of reliability. They must demonstrate to partners that 'We [can] make this gig materialize'. The present uncertainty and lack of confidence around the live music, and broader, economy undercuts this and exacerbates existing issues around the industry practice of provisionally booking the same artists into different-sized venues for the same tour, before waiting to see how related promotion activities (e.g around the release of a record) may go before committing. This can often mean that larger capacity venues (including for example the Town Hall and Symphony Hall) may lose an artist a few

[16] UK Music (2017) *Wish You Were Here 2017: The Contribution of Live Music to the UK Economy*, p.6, p. 14. https://www.ukmusic.org/assets/general/Report_WYWH_17.pdf; UK Music (2019) *MU5IC BY NUM8ERS 2019,* forthcoming (20 Nov 2019).

months out from show date and then be forced to fill that slot; post-Brexit uncertainty plus the anticipated additional red tape will make filling those slots harder.



Symphony Hall, B1 2EA, capacity 2,262

This is related to the major concerns, mentioned above, about the potentially ***massive administrative cost of Brexit for Birmingham-based bands***. While larger acts may have labels to back them up, the smaller acts will not be able to afford the costs of building up a presence on the Continent.

Touring for them will be very difficult in terms of paperwork, and administrative matters – the 'really boring, but really important stuff' as one participant put it. This may stop bands being able to tour and engage in cultural exchanges across Europe. There is also a particular ***concern over increased insurance costs***. Given also that 19% of people involved in 'music, visual [and] performing arts' in the Greater Birmingham & Solihull area[17] are self-employed or freelance (with 21% being sole proprietors of their enterprises) they will feel administrative issues particularly keenly. But, these problems are not limited to local acts and businesses. Anecdotal evidence suggests that increasing difficulty and costs related to visas and administrative documents are already dissuading acts from visiting.[18] Related to this, the local venues in our group were also concerned about being able to offer a wide variety of music given an increase in costs and difficulty when it came to booking 'riskier' acts whose broad commercial appeal is less certain either through being less well-known in their field, or operating in genres with more niche appeal. Given that the local music scene has a high proportion of small and mid-size venues (i.e. those holding fewer than 500 people), and that promotion in those venues is often handled by freelance promoters, there is widespread concern that the local sector may

[17] BOP Consulting (2017) *Mapping the Creative Economy of Greater Birmingham*, p.4 https://gbslep.co.uk/wp-content/uploads/2017/12/Creative-Economy-Mapping-Exec-GBSLEP-Dec2017-digital-version.pdf

[18] Incorporated Society of Musicians (2019) *Impact of Brexit on Musicians: Fourth Report (May 2019)*, p.4. https://www.ism.org/images/files/FINAL-WEB-ISM_Brexit-Report_May-2019.pdf

not be able to provide sufficient support to extend invitations to bands visiting from abroad, an issue that may compound problems of 'cultural pushback' and stagnation highlighted earlier. In particular, the lack of certainty with regard to the unilateral migration arrangement and new trade deals received the large attention of the stakeholders. In the immediate vicinity of the previous Brexit date (e.g. 29th March 2019), the evidence from promoters in the city suggests that foreign acts were unwilling to organize their visits around an expected 'exit date'. Similarly, a number of the city's grassroots bands cancelled tours that coincided with the date. The new regulatory and customs arrangements are likely to affect bands on tours (i.e. Should merchandise be produced in the UK or rather on tour, while in the EU country, to avoid extra taxation? What will happen with basic health insurance provisions, when an EHIC card will not apply anymore?) and that adds to the uncertainties list.

A general feeling that ***a lack of clarity about what to do, who should do it, and why it should be done***, is also hampering the sector. The participant group exhibited particular confusion over who is in charge of making sure that support and guidance for the sector is in place, and it was unclear to them whether central Government, local councils, or other bodies should be providing this. Questions and concerns emerged also with regard to useful knowledge over which organizations they may want or need to join in order to get support, and what the cost-benefit analysis of those memberships would be. It was felt that more detailed guidance on what, specifically, the various music membership and representative organizations could offer local stakeholders in terms of Brexit would therefore be beneficial. Clear and consistent advice should be made available to them as ***knowledge about the current situation with regards to Brexit and its effects on the industry is vital to the industry***.

The Sunflower Lounge, B5 4EG, capacity 120

Relatedly, although live music makes a large contribution to the British economy (£1 billion in 2016 with 14 % growth from 2015 according to UK Music)[19]

[19] UK Music (2017) *Measuring Music Report 2017*, p.6.

stakeholders pointed out that ***live music did not appear to be a priority within Brexit negotiations***. There was a general feeling that many sectors are lobbying around Brexit and that this lobbying activity had a potentially useful impact overall. Nevertheless, although the group were aware that the UK music industry is no different in this regard and that lobbying activity was taking place on behalf of the sector, they nevertheless felt that there was a risk of the focus on what one participant described as the 'tub-thumping' of larger, national players, leaving insufficient room for discussion or alternative voices. While it is to some extent inevitable that national bodies will have to take a bird's-eye view in addressing a national set of concerns, there was a feeling that this could have the effect of a 'closed shop' speaking for an entire sector, with regional and local voices and concerns within that sector struggling to make themselves heard. It should be noted, however, that this is something of a perennial concern and may manifest in other, non-Brexit related issues in music and other sectors. However, and related to the above, the manner in which Brexit has taken up the entire capacity of the Civil Service was also linked to structural and lobbying consequences for the sector, and in particular with ***a lack of civil service bandwidth creating a variety of opportunity costs***, one in particular being hindrances to the discussions on Regional Music Boards. These bodies – recommended by the DCMS Committee's report on live music amongst others – are intended to be dedicated to the promotion of music at grassroots levels, including live music, within specific geographical areas including the West Midlands.[20] Thus, the issues related to a lack of representation or 'voice' at a national level are compounded by the absence of the Regional Music Boards that would create much-needed additional capacity in the policy making system dedicated to music and live music.

Pirate Studios, B9 4EG

https://www.ukmusic.org/assets/general/Measuring_Music_2017_Final.pdf

[20] Digital, Culture, Media and Sport Committee of House of Commons (2019) *Live music: Ninth Report of Session 2017–19*, p.45.
https://publications.parliament.uk/pa/cm201719/cmselect/cmcumeds/733/733.pdf

The example of the Regional Music Board also revealed the perception of issues related to the implementation of recommendations and the pursuit of common strategies. The issue is – it should be noted - a perpetual problem in Birmingham, as participants acknowledged. However a number of reports on the Birmingham music industry[21] have provided recommendations on how to support the local music scene, yet only a few of these recommendations have to date been implemented. For example, a single contact for the industry and venues within Birmingham City Council (BCC), who could bring together different aspects of the City Council as necessary and be a link between the Council for the industry, was in place for only a short period of time before the post was removed following withdrawal of council funding. The group noted that a similar function is still in operation for the film industry.

The workshop revealed the stakeholders' disappointment with a lack of a clear strategy for the music sector in Birmingham. While there have been previous attempts at producing such a strategy,[22] a widely agreed evidence-based set of policies to maintain a robust flow of information and to raise the profile of the West Midlands' music remains elusive. A clear and sustainable music strategy for the city would help to guide public investments – which have hitherto tended towards being *ad hoc*, and with scope for better co-ordination and clearer targeting at specific sectors. These factors are, of course, not purely a consequence of Brexit. But they do illustrate the difficulty of disentangling Brexit from policymaking at large as well as how the risks posed by Brexit accentuate structural and longer-standing issues elsewhere. They also point towards the heightened need for localized responses, and hence the value of further communication and co-ordination amongst local and national stakeholders.

[21] See for example:
Birmingham City Council (2012) Destination Birmingham. Birmingham, A Music City.
https://www.birmingham.gov.uk/downloads/file/450/destination_birmingham_a_music_city_february_2012
Digital Central (2008) A Vision for the Music Industry in the West Midlands.
http://www.immhive.org/wp-content/uploads/2012/03/8832535-A_Joint_Vision_for_the_Music_Industry_in_the_West_Midlands_tcm9-13417.pdf

[22] Birmingham City Council (2012) *Destination Birmingham. Birmingham, A Music City*.
https://www.birmingham.gov.uk/downloads/file/450/destination_birmingham_a_music_city_february_2012

The importance of understanding the economic, cultural and social impact of Brexit on the live music sector in Birmingham

In this section, we look at the contextual texture of Birmingham and the greater West Midlands conurbation when it comes to the live music sector. We begin to scope out what is missing from the knowledge-base about this and where a research programme could start to address those gaps. Building on the foundations of the 7th May event, we point towards proposals for future research activities and unpack how that work will assist musicians, stakeholders and policymakers in a better understanding of the live music ecosystem of Birmingham.

Birmingham is a large city in terms of population, larger than Manchester and Liverpool combined. With over 1 million inhabitants[23] and one City Council, it has a number of issues to deal with, including education and housing, as well as with its refuse collection and transport services. Its music and culture (music structures and infrastructures) are low in the 'pecking order' of the city's agenda and they suffer from this. As revealed in the workshop, local stakeholders point to a lack of strategic attention paid to the sector. The work undertaken in this programme of research aims to provide qualitative and quantitative evidence of the breadth and scope of the sector, which in turn will assist stakeholder groups in placing the sector on the agenda. Targeted mapping of the live music sector, specifically, in Birmingham will be a valuable means of assessing both the current scale of activity, and the key concerns of participants.

Birmingham is also *geographically* large (103.4 square miles)[24] with a distinguished north-south divide. Anecdotally the northern part of

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

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

the city has fewer venues and cultural facilities than the south, and this is compounded by a city transport system not particularly adept at connecting north with south, and vice versa. This creates a high cost of travel between the two, leading to a sense of disfranchisement and marginalization amongst certain groups of people and communities, and particularly amongst young people. The work being carried out in this research programme will help map elements of the live music ecology so that these issues can be demonstrated by evidence and testimonials, in order to help stakeholders within the city create a more coherent, strategic approach to the on-going health of the sector. There are great opportunities coming to the city. The Commonwealth Games in 2022, for instance, could help to change the outlook of the northern section in particular (see for example plans proposed for the Perry Barr area[25]), but facilities enhancing the music scene there have to be improved.

Birmingham has a long, rich history of producing and consuming popular music and popular culture more generally. From Metal and the New Romantics to Reggae, Bhangra, Classical, Jazz, Indie, Electronic and House, the city and its musicians have helped to shape the development of popular music across the globe. Its cultural heritage includes acts such as Black Sabbath, Duran Duran, The Beat, Steel Pulse, Judas Priest, as well as the City of Birmingham Symphony Orchestra. Birmingham's music heritage is something that it can shout about more – nationally and internationally. UB40's first gig took place at the Hare & Hounds in Kings Heath (B14 7JZ), Black Sabbath can trace their roots back to Aston (B6). If historically there has been a lack of recognition outside Birmingham of what the city has to offer Birmingham's marketing has improved. 'The Home of Metal' is an example of a positive initiative.[26]

Home of Metal Exhibit, Birmingham Museum, B3 3DH

The stakeholder group recognized the importance of this heritage and of music tourism to the city – both in terms of existing revenue and future investment.

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https://ons.maps.arcgis.com/home/item.html?id=a79de233ad254a6d9f76298e666abb2b

[25] WMCA (2019) *Birmingham 2022 Commonwealth Games Athletes' Village Phase Two planning consent secured*. https://www.wmca.org.uk/news/birmingham-2022-commonwealth-games-athletes-village-phase-two-planning-consent-secured/

[26] https://homeofmetal.com/event/black-sabbath-50-years/

People travel not only into the city, but around the city, supporting venues, spending money not just in the venues themselves, but also around them in restaurants and local bars and hotels. The venues become local hubs that are important for the local economy. But, culturally, these venues have much wider effects in contributing to the *identity* of the city. The stakeholder groups revealed significant concerns that music tourism, associated investment and the reputation of the city itself may suffer in post-Brexit scenarios. They also, however, recognized that there is a chance to see Brexit as an opportunity for Birmingham, to say 'We are still open for business. We are still planning ahead. If there are going to be problems, we will get over them.'

The planned research that the workshop informed will seek to explore not only how issues related to Brexit put that under threat, and how the sector is mitigating and responding to those threats, but – and related to the above – how the specific, *underlying* and existing facets of Birmingham's live music culture can be deployed in such responses.

Additionally, and relatedly, the live music sector in Birmingham has a history of social inclusion with a focus on working class and ethnic minority musical acts, for example, the 'Celebrating Musical Inclusion' project[27] and the 'Birmingham Music Hub',[28] as well as, a number of initiatives that have celebrated Birmingham's varied musical heritage (for instance, the 'Birmingham Music Archive'[29] and 'Made in Birmingham: Reggae Punk Bhangra'[30]). Birmingham is a hugely diverse city, accommodating different types of community, including the Somali community in the south of the city in Sparkhill to the Polish community in the north. The city also has a long history of inwards migration from Irish, Caribbean and Southeast Asian communities. This diversity highlights the need for different types of venues and events that reflect those communities and for voices from those communities to be represented in conversations such as our 7th May workshop.

The workshop revealed Brexit-related concerns over access to funding that is vital to support non-commercial musical activity, along with the increase in administrative costs and red tape associated with operating music events. Mapping of live music in Birmingham will, then, need to account for diversity in social actors, as well as different industrial orientations. Again, a targeted research exercise with a focus on live music will help to uncover the specificities and details of

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27 https://cbso.co.uk/event/celebrating-musical-inclusion

28 https://bmep.servicesforeducation.co.uk/

29 http://www.birminghammusicarchive.com/

30 http://www.birminghammusicarchive.com/made-in-birmingham-reggae-punk-bhangra-3/

Birmingham's live music, both economically and socially, along with key local concerns as previous live music censuses have done in cities such as Edinburgh, Glasgow, Newcastle, Oxford, Bristol, Melbourne and Adelaide.[31]

Birmingham Arena, B1 2AA, capacity 15,800

As well as being a diverse city, Birmingham is also a very youthful one. 40% of the population is below the age of 25, making it one of the youngest cities in Europe.[32] Live music will be very important to these people as they develop their careers and cultural lives, and the potential issues raised by the stakeholder group highlight how this may suffer in the event of certain post-Brexit scenarios. As such, it is not only inward investment that is at risk, but also the vibrancy of local scenes and the potential for new, innovative businesses should Birmingham's young population be culturally under-served. Finally, there are also questions of Commercial Sensitivity in terms of any solutions that may emerge to post-Brexit issues. Clearly the promoters (or others involved in the local music ecology) that manage to solve those issues are entitled to view these as a competitive advantage over those who cannot solve them, or solve them efficiently. Where is the incentive to pool knowledge? Moreover, there is a feeling that larger players – although lobbying effectively for the UK music sector as a whole at the national level – could still benefit from more detailed involvement of smaller and regional voices. Communication is obviously a two-way street. Thus, the independent music industry in the city needs to be better organized. It needs to be able to demonstrate its economic and cultural value to the city, and at large, with income from music tourism, for instance, along with its contribution to the job market. To that end, an ambitious programme of research, which will provide such data, will be of long-term value in supporting the case for helping to nurture Birmingham's music sector, so that it is even stronger for the future, and for generations beyond Brexit.

[31] Webster, E., Brennan, M., Behr, A., Cloonan M., Ansell, J. (2018) *Valuing Live Music: The UK Live Music Census 2017 Report*. Live Music Exchange/University of Edinburgh/Newcastle University/University of Turku. http://uklivemusiccensus.org/#report

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

Conclusions

The workshop and discussions that led to this report constitute the opening phases of a broader Birmingham Live Music Project (BLMP), a collaborative research agenda undertaken by the authors.[33] As part of this future consultation with, and the involvement of, a varied network of concerned parties will be crucial to the development of a widely applicable programme. The group that was assembled in May pointed the way forward for a considered and inclusive consultation process. Consisting of academics, policymakers, workers in linked industries, trade bodies, promoters and venue proprietors from the Birmingham area, these individuals came together to lay out the scope of the issues, concerns and possibilities they foresaw coming about due to the Brexit process. Drawing together the collective insights and opinions of this diverse group allowed for a productive start in drawing out key points and concerns.

On the practical level, the issue of disruption to just-in-time supply chains, and the lack of warehouse storage nationally that has resulted from their universal adoption, was a major concern. The resultant increase in storage costs would join other increased costs such as administration, visa fees and insurance to push overheads much higher. At the same time as these increased costs, the impact on consumer confidence and disposable incomes could see a reduction in the number of people partaking of live music, with a particular concern being the 2020 festival season. It was believed that this threatened many of the high-end production companies – of which Birmingham has a high number – and reduce the pool of skilled employees in the future. A linked future concern was the UK either being cut off from or having no say in the design of the Digital Single Market currently being developed in the European Union.

On a more subjective level, the stakeholders felt that the damage to the UK's international reputation as a positive and open place, together with potential visa issues, could cause a cultural 'pushback' against Britain and British artists and a reduction in cross-border cultural exchange. The practical implications of this would be severe. Firstly, a reduction in the volume of music tourism. Secondly, international acts which have traditionally used the UK as a gateway to European tours may begin their tours in the nearby Dublin instead due to reduced visa or other administration costs and complications. This matters because such acts usually hire support crews in their first location and then take them on tour.

[33] The BLMP and the workshop in May were supported by the Aston-Centre-Europe. https://www2.aston.ac.uk/lss/research/lss-research/aston-centre-europe/projects-grants/index

All of these factors are exacerbated by a perceived lack of reliable information or single locus from which to gain knowledge about the implications of Brexit for the industry. The continuing lack of regional music boards was felt to be particularly problematic in light of this, in particular given the lack of bandwidth in the civil service more broadly to deal with the issues raised by Brexit across multiple industries. Whilst participants could understand the focus on industries such as agriculture, pharmaceuticals and manufacturing it was felt that the creative industries more broadly and music in particular were excluded from Brexit preparations because of this insufficient bandwidth.

Birmingham is a large city, population wise it is larger than Manchester and Liverpool combined and it stretches to over 100 square miles. This makes the live music ecosystem large enough to be able to act as a stress test and to have differences within areas of the city which can show up different responses and their effectiveness. Birmingham also has a long and vaunted musical history across genres, being the birthplace of heavy metal music and with an impact on various genres. As such, it is an ideal testbed for an analysis of the impact of Brexit on live music. One of the problems, we encountered is the question of the actual depth and breadth of Birmingham's live music scene. This is as unknown as the impacts Brexit may have upon it. As we have shown, the concerns are myriad and the scope is large: the city has a fairly robust musical landscape, with large scale venues, but there are countless others - folk clubs, dance hall venues, irregular Indie gatherings, and mini-festivals - whose voices would add depth to the discussions. It is important to understand that live music family better so that together we can prepare a robust response to any post-Brexit landscape.

Alongside the workshop and responses outlined in this report, further work is planned within the Birmingham Live Music (BLMP) research programme to examine the impact of shifts in the globalized music economy and national level changes on localised cultural, social and economic actors from the perspective of Birmingham. Its aims are to inform the public, policy-makers, and the different stakeholders involved of these effects, along with best practices and possible solutions to the different challenges faced by the globalised live music industry on a local scale. Funding bids are in process to support a detailed mapping of the live music ecosystem in Birmingham, deploying elements of the established 'live music census' methodologies (replicable surveys of audiences, musicians, venues and promoters, interview and observational data, stakeholder consultation) to produce tailored qualitative and quantitative data and recommendations in the Birmingham and West Midlands context, and contribute to the broader picture of the UK's place in the global live music economy.

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BLMP Webpage:
https://www2.aston.ac.uk/lss/research/lss-research/aston-centre-europe/projects-grants/index

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