The effects of Brexit and Covid19 on Birmingham's night-time economy, hospitality, culture and leisure sectors

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Presentations for BCC Economy and Skills Overview and Scrutiny Committee, 24th Feb 2021

Creative Industries Policy & Evidence Centre
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Outline

Birmingham Live Music Project (research into impact of Brexit and Covid19 on Birmingham live music industry)

- ✓Birmingham Live Music Ecology
- ✓Impact of Brexit & recommendations
- ✓Impact of Covid19 & recommendations

Birmingham Live Music Project

Aims and objectives:

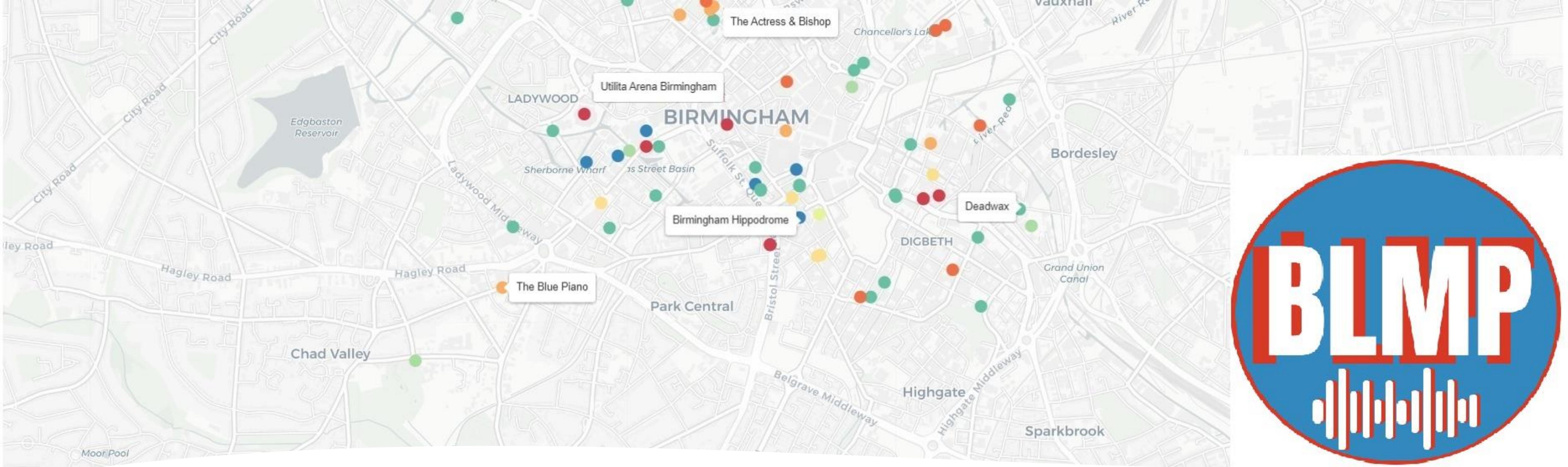
- **Measuring the impact** of shifts in the globalised music economy and nation-state level changes (eg. **Brexit + COVID**) on localised culture, social & economic actors
- Information sharing (plethora of stakeholders)
- Building and sustaining a network/Facilitating knowledge exchange

Research questions:

- Economic and socio-cultural shifts and their impact on live music in localised perspective?
- **How to ensure a thriving live music 'ecology'**?
- **Challenges** to creating and maintaining coping mechanisms for live music culture?
- **Responses to barriers** and **opportunities**?

Methods:

- City mapping
- Workshops
- Interviews
- Surveys



Birmingham Live Music Ecology

- Birmingham Live Music Map (https://livemusicresearch.online/blmp/)
  - 195 venues (156 within B1-48; 8 broad venue types) with estimated capacity of 98.000 (predominant grassroot music venues + pubs and bars)
  - 877.000 music tourists (19% growth), £252 million direct and indirect spend, 2.453 FTE (2019)
  - Average spend £5-£190, £20.84 per month (in a city with almost 1million population)
  - Similar profile to Liverpool & Glasgow (pubs and bars in the urban centres), unique: ‘unorthodox’ and outdoor spaces in the epicentre (1mile from NW)
  - Music clusters: Moseley, Kings Heath, but also Sutton Coldfield (pubs and bars)
- Small scale venues as epicentres of large supply-chain network
- RECOMMENDATION:
  - Recognition of pubs, bars and grassroot venues as sites of artists and audiences’ development (as cultural assets); inclusion of those in the cultural policies of the city; hosting of live music events defined as a factor enhancing chances of license application
  - An across-policy approach, supported by Live music (and wider night-time economy) impact assessment coordinated by a Music Office/Nigh Major for the region

Impact of Brexit

Provisions around touring, work/visa permits, drop in consumer confidence

Key observations (#Bham)

- ❑ ~~Summer festival 2020~~
- ❑ Disrupted supply chain & shortage of warehouse spaces
- ❑ Future of high-end production companies
- ❑ Recruitment of skilled employees (29% non-UK nationals) and musicians (visa regime and income requirement)
- ❑ EU touring (outgoing and incoming; 65% performing outside the UK)
- ❑ ~~Music tourism (7% attends gigs outside the UK)~~
- ❑ Reputational damage, cultural pushback, homogenisation of the music scene (stagnation)
- ❑ Administrative costs (+red tape)
- ❑ Lack of reliable information & bandwidth at the national and local level to deal with it

RECOMMENDATION:

- ❑ **A need for educating policy-makers and regulators on the realities of the live music ecology and regulations/law impact on the industry**
- ❑ **Night-time industry impact assessment**

Impact of COVID19 (Key findings)

Sub-local

- Lost income (70% professionals self-employed, with 72% taxable income below £24.000) & networks
- Digitalization (streaming), alternative business models vs sustainability of the solutions

Local (Birmingham and the WM region)

- City's live music capacity under Covid's tier system (economic viability of live events at 20-25% capacity)
- Support for venues (CRF: 48 venues, £15 million, 3.68%; potential for wider understanding of live music population ecology; grassroot venues, pubs and bars)

– Culture Central –

National (UK Live Music Industry)

- National policy (protocols + bailouts)
- Audience confidence
- Economic/social/cultural impact
- <u>Covid vs Brexit</u>

Covid19: RECOMMENDATIONS

- The government response over the longer term will need to start taking account of **strategic considerations**, including **the role of live event spaces and participants diffused throughout the musical ecology**.
- **Robust and sustainable information hubs** to support local venues of all kinds, and audiences, on the road to the recovery. A good example here could be initiatives undertaken by the Liverpool City Region, including the Music Fund, a support for the Liverpool City Region Music Board (an independent, sector lead board).
- Venues, while planning their return to regular activities, should start building **awareness campaigns** about implemented social distancing and health and safety solutions. While relatively low cost, it will build the audience's confidence and will make patrons more willing to come back to the venues. Taking the gig-goers reliance on modern technologies, the advice is to use social media to conduct those campaigns.
- In the longer term, live-streaming – by musicians themselves, and by venues and promoters – and other practices that have come to the fore as a result of the pandemic look likely to become increasingly embedded in industry practice. Here, there is both a need and an opportunity for institutions of further and higher education to respond to the shift. **Training in the relevant digital technologies**, for creative practitioners and associated businesses, will be an important aspect of responding not just to new tools and practices but new strategies and modes of practice.

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