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Edinburgh
Live Music Census 2015
Pilot Study



Report by:
Dr Adam Behr & Dr Emma Webster
with Dr Matt Brennan

September 2015



THE UNIVERSITY of EDINBURGH
Edinburgh College of Art



Project team: Dr Adam Behr, Dr Emma Webster & Dr Matt Brennan

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Edinburgh
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Foreword and Executive Summary

FOREWORD

It is not news to live music practitioners in Britain that, despite the growth of the sector in the past decade, the benefits are being felt unevenly. Although there are a rich variety of different sizes and types of performance spaces across the live music ecology, it seems like, in 2015, barely a week goes by without a venue coming under threat of closure. The problems are particularly acute for smaller, independent venues.

The inherent precariousness of running a music venue – a difficult enterprise at the best of times – is exacerbated by external pressures from things like residential development and the ever-shifting nature of local politics. But the issue is being paid more attention than ever before. The formation of the Music Venue Trust in 2014 and subsequently the Music Venues Alliance in 2015 has provided for the first time a collective voice for venue operators who have long been subject to different specific local conditions, the difficulties of working together exacerbated by geographical distance.

There is some common ground across the country. Not least, the Music Venue Trust and Musicians' Union are supporting a campaign for the introduction of the 'Agent of Change' principle to protect established venues from complaints arising from new buildings in the area. But the challenges and opportunities also vary from area to area. Any locality has a characteristic live music 'ecology' – a mix of venues of different capacities, demographic variations and the distinctive features of its local government and infrastructure.

One notable aspect of Edinburgh, of course, is the huge surge in cultural activity that takes place over the festival. But this has also led to questions about an imbalance between the summer surfeit and the city's year round provision. Edinburgh seems to struggle to maintain independent music venues, and closures over the last few years have seen mounting concerns.

Dedicated music venues and pubs alike have also mobilised in opposition to a clause in the local licensing policy stipulating that amplified music be 'inaudible' in neighbouring residential properties – venues says this a sledgehammer to crack a nut that is not in operation anywhere else in the country. The Council, for its part, has undertaken to pay closer attention to the needs of venues across the city, setting up working groups to examine the inaudibility clause and its music strategy more widely.

These initiatives, local and national, require evidence to get a sense of the state of play and to illustrate the full range of musical activity. However, there is currently a dearth of granular data in this country. To remedy this, we took inspiration from an exercise in Victoria, Australia in 2012 – a census of live music in Melbourne. We decided to undertake a pilot study replicating the methodology deployed in Melbourne, where possible, to gather information in Edinburgh. The Melbourne team were kind enough to share insights from their own experience with us, and we therefore took the opportunity to trial the idea and to gain experience ourselves of measuring musical activity in this way, to feed into an active discussion and situation locally that calls for attention – indeed, there has been progress in Melbourne in alleviating some of the regulatory pressures on venues since the 2012 census.

Although it was impossible to provide comprehensive data about the entire city, and our resources were limited, we nevertheless believe that what has been revealed even in this pilot study illustrates clearly both the value of live music to Edinburgh and of the Victoria Census approach to appraising it.

We also realise that the situation across the UK requires further investigation and the climate is ripe for providing a picture that looks beyond the headlines, and headliners. An undertaking of that kind at national level requires careful consideration, however, and large resources. Our belief that viewing a locality's live music scene as an 'ecology' calls for much more than purely economic data or a tight focus on specific components (like venues, or ticket sales) and also needs to include those who perform in the venues and those to whom they perform. In the challenging yet broad ranging approach we have taken here, we hope to have taken steps forward in developing a clearer approach to investigating such ecologies.

Acknowledgements

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Thanks also to Caroline Sewell at the Musicians' Union (<http://www.musiciansunion.org.uk>) for commenting on and helping to promote the musician survey, to Beverley Whittrick of the Music Venue Trust (<http://www.musicvenuetrust.com>), to Nick Stewart at Sneaky Pete's for comments on the venue survey, to Nick Cooper and Emma Smith for promoting both the musician and audience surveys, to Ciara Elwis for additional data gathering, and to Cole Bendall for invaluable assistance in inputting hard copy data.

Promoting and distributing the surveys would also have been impossible without the co-operation of local businesses and musicians so thanks are also due to Ian Forrest, Rab Hayes, Dave Swanson, Ruraj Wilson, Stephen Tierney at Morningside Creative Studios, Julian Vaughn at Tonegarden, Simon Illingworth at Whiski, Ruth Muir and staff at Credo, and the staff of the Lioness of Leith.

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Finally, collecting data from venues across the city with a small team involved a significant amount of legwork so many thanks to Tom Western, Stacey Western, Sergio Pisfil Zaveleta, Madeleine Watson, Flora Hidasi, Alison Young, Charlie Smith, Mo Moxy, Brian McNeil, Aslaich Hogg and Emma Smith (again!) for giving up their spare time to help.

EXECUTIVE SUMMARY

Whilst it is perhaps best known internationally for its festivals, Edinburgh's music scene is vibrant and its residents are keen supporters of a dedicated community of musicians throughout the year, particularly in relation to its population base and size.

- **Edinburgh currently has a *minimum* of 267 venues offering live music including music played by DJs** based on our analysis of local listings.

Amongst these, our visits to venues, online survey and analysis of social media and venue webpages indicate that 94 host feature musicians or DJs two or more times a week with a further 116 for whom music is a partial part of their offering on occasion even where it is not a key driver..

- **The most prevalent types of venue in Edinburgh are pubs/bars**

We counted 123 pubs/bars in total (or 46%) and, supplemented by online surveys and analysis of listings, websites and social media pages, visits to these type of venues formed the bulk of our live Census taking exercise.

- **We estimate that on Saturday 6th June there were approximately 11,500 people attending live music events in Edinburgh.**

Taking place on Saturday 6th June, our Census is based on a comparatively quiet night for live events in Edinburgh, outside of the festival period and term-time for students and with no major events at the largest venues used for gigs (e.g. The Corn Exchange and Murrayfield Stadium). Nevertheless, it illustrated a vibrant and varied range of music activity.

- **Annually, we conservatively estimate that the annual total attendance of live music events in Edinburgh is upwards of 2.7 million people.**

The figure above is based on census data and analysis of listings, venue websites and social media pages and including live music provided for free at pubs, cafes and restaurants, etc. but not including the festivals, **we estimate that there are over 23,000 live music events per year.**

Audiences

- **The total average annual spend on live music per person for a typical live music fan is £1,120.**

The average Edinburgh music fan amongst our respondents also spends an average of £93 on live music per month in total (tickets + food/alcohol + transport).

- **Approximately £170,000 was spent at live music on the night of the Census (approximately £90,000 on ticket sales alone).**

The estimate above is based on £15 per head per gig (£93.30 monthly total divided by 6.3 gigs per month).

- **The total estimate of spend at live music in Edinburgh per year (incl. tickets, food/drink, and travel) is at least £40 million.**

This figure is based on £15 per head per gig. (Note that this is direct spend, not Gross Value Added to the city economy, a figure that is likely to be much higher).

- **We estimate that musicians and DJs in Edinburgh alone are paid approximately £2.9 million per year.**

This figure is based on Census data from venues visited, and on the musician survey reporting an average of £92 per gig. Musicians and DJs in Edinburgh were paid £14,150 on the night of the Census.

- **Respondents to our audience survey indicated that they attend an average of 6 events with live music per month.**

It appears to be the case that Edinburgh residents attend more live music events than the Scottish norm. Each month, this includes ticketed concerts/festivals (2.1), non-ticketed pub or club events (2.8) and ticket club events (1.4).

These findings corroborate indications from other sources that Edinburgh residents' attendance at cultural events is greater than the Scottish average.

Venues: Employment

From venues visited on the Census night, we estimate that there were over 335 non-musician venue staff working on Saturday 6th June.

- **Assuming minimum wage, we estimate that venue and productions staff are paid at least £2.6 million per year at this sub-set of venues alone while live music is on.**

Venues: Regulatory and noise issues

- **The census indicates that there is a high level of self-policing is taking place amongst Edinburgh venue operators with regard to noise issues.**
- **Moreover, the city licensing board's 'inaudibility clause' frequently cropped up in the qualitative comments of the surveys, suggesting that it has a 'chilling effect' on venues' preparedness to put on live music and the kind of music they will provide.**

48% of venues responding to the enumerated survey collected by Census takers reported having been affected by 'noise, planning or development issues'.

42% of respondents to the venue online survey reported currently experiencing issues relating to noise.

44% of musicians reported that their gigs had been affected by noise restrictions (NB: These may have included noise restrictions imposed by venues).

Data supplied by the City of Edinburgh Council indicates that for the period 1st April 2014 to 30th June 2015 it received only 64 complaints related to live music, related to only 18 venues in total, with none of these complaints reaching the stage of being addressed by the licensing board.

Therefore, venues reporting 'noise issues' in our survey include those that have been resolved without 'official' involvement. This is borne out by the fact that whilst 42% of venues reported 'noise issues' only 15% reported 'licensing issues', not all of which may not have been related to noise.

Musicians

234 online responses to our survey showed an active cohort of musicians in the capital city. The average respondent has had some formal music tuition/training (63%) but is much less likely to have had formal music industry training (16%).

The vast majority of respondents are self-managed (91%), and the typical respondent is equally likely to be a member of no societies or unions (39%) as he is to be a member of PRS for Music (Performing Rights Society), and is slightly less likely to be a member of the Musicians' Union (36%).

44% of respondents earn the majority of their income from music and a typical respondent plays an average of five (4.6) gigs per month of which 61% are paid; the majority of which are paid via a straight fee (69%) and will earn an average of £92 per gig if he is a solo or duo act, and an average of £234 (paid jointly) in a band.

Recommendations for policy action

Based on the evidence collected in the live music census, the authors offer following three key policy recommendations:

- 1. Change inaudibility clause to 'nuisance' or decibel-level (through negotiation with Licensing Board).**
- 2. Adopt the 'agent of change' principle as guidance for informing planning decisions around venues and advising residents, and work towards its enactment by the Scottish Parliament in law.**
- 3. Ensure the city council's forthcoming refresh of its cultural policy recognises both the economic and cultural value of live music to the city, and promise to do what it can to protect small to medium capacity music venues in particular in this challenging climate.**

Both the quantitative findings and qualitative comments in our study indicate that the 'inaudibility' clause in licences – stating that amplified music should be 'inaudible in a neighbouring property' – is impacting on live music provision well beyond official interventions from council officers and police. It has a 'chilling effect' on the willingness of venues to provide live music. With the licensing board's policy due for review in 2016 this is an opportune moment to address this issue.

Addressing this by reframing the terminology used to more explicitly refer to 'nuisance' rather than audibility of any kind would help to redress the balance of a situation that currently works against venues and musicians.

We recognise that the City of Edinburgh Council is aware of this issue and has engaged in dialogue with the music community in the city. We recommend that it work to ensure the continuation of such dialogue in formulating its cultural policy and taking on board the recommendations of this report, the work of the Music Venue Trust and the comments arising from the Desire Lines initiative that has highlighted the concerns and findings of the cultural sector in the city as a whole. In this regard, we welcome the Desire Lines initiative and support its goal of working with the Council to promote a cultural policy that is sensitive to the year round provision of culture in the city.

One means of working towards this would be to adopt an 'Agent of Change' principle that protects existing uses of businesses by placing the responsibility for managing the impact of a change to an area or business upon the person or business responsible for that change.

We accept that there are challenges in making changes to the law to take account of this that may require dialogue with the Scottish Government but see an opportunity for Edinburgh to take a lead in Scotland – and for Scotland to take a lead more broadly – in moving forward with this.

Additional recommendations

Additional specific recommendations from venue operators and musicians in the city emerged from the qualitative responses to the online survey (see pages 57-58 and 88-90) as well as from previous stakeholder discussions including the Desire Lines initiative. Whilst there are potential cost implications for some of these, there are precedents in some case for their adoption and a likely benefit to musical provision in Edinburgh. They include:

- Free or subsidised parking permit for load-ins and load-outs at pre-agreed venues.
- Investment in venues and rehearsal spaces, either directly or in kind by facilitating the use of empty council building stock for live music activity.
- Ensure that all licensing and planning officers receive training on the cultural and economic value of live music and associated issues.
- Creation and maintenance of a centralised and focused database of venues with capacity information, ownership and live music activity to enable longitudinal tracking of the growth or shrinkage of provision in the city.
- Creation and maintenance of an online map of venues in the city based on information in the database. (Our project team is working towards this based on information gathered over the course of this study and as part of the next phase of our research).
- Establishment of an accessible 'one-stop shop' for music as part of the City of Edinburgh Council's web presence containing all the necessary information specific to putting on live music, with named points of contact for enquiries and promoting funding opportunities for musicians across genres and career stages.

Recommendations for further research

We propose taking the methodological lessons from this pilot study in Edinburgh forward and deploying them in a broader census of live music in the UK. (The authors have already begun work on this next phase of research).

As indicated in our contextual chapter and methodological notes, providing a clear picture of all live music activity in a city is extremely challenging, particularly given the fluidity of the situation and the underlying issues regarding definition and categorisation of music venues. Nevertheless, the potential benefits of such an exercise to the live music scenes in individual cities and the UK as a whole are considerable. This pilot study itself revealed both the extent of live music in venues not previously covered by assessments of cultural activity and its value to the city.

Given that the pubs, cafes and small venues – the 'bread and butter' venues for most local musicians – are those that face the biggest challenges in the current economic and regulatory climate across UK, a more widespread data gathering exercise would be of value. This would allow for a more robust assessment of the true picture of live music in Britain, and the relationship of small venues – including those whose primary business may not be music related – to the overall musical ecology.

It is beyond the scope of this report to conduct a detailed analysis across all international assessments of cities' music sectors. However, we believe that further examination and comparison would be beneficial with regard to revealing the fault-lines in how different localities, companies and organisations set the parameters of what counts as music and, more specifically, live music activity.

Edinburgh
Live Music Census 2015



Chapter 1
Research Context and
Comparative Sources

CHAPTER 1: RESEARCH CONTEXT AND COMPARATIVE SOURCES

General definitional and data issues

A UNESCO report on *Measuring Cultural Participation* states that “[t]he gap between the complexity of the cultural field and the availability of reliable datasets has always been a major concern for cultural researchers and statisticians”¹, at least since initial attempts in the U.S and Europe to establish datasets on culture at national level.

It then goes on to highlight the rapidity with which this gap is widening², paying particular attention to the blurring of boundaries between genres and, importantly, production and consumption wrought by digital technology.

Variances in definitional categories are evident across the different investigations in Edinburgh, Scotland and the UK – as are grey areas and blurred boundaries between what counts as a musical event or not. For instance, the City of Edinburgh Council’s People Survey has separate categories for ‘Live Music or Concert’ and ‘Theatre’ but a piece of musical theatre has an ambiguous status as it could be described as both. Likewise, the Scottish Household Survey³ also includes categories for ‘Dance Show/Event inc. ballet’, ‘Theatre e.g. pantomime/play’, ‘Street Arts’ and ‘Culturally Specific Festival’. Any of these may employ musicians or feature music as a significant part of the attraction yet are counted separately from concerts and live music.

This is not to criticise or diminish any specific categorisations. Rather, it is to point to the difficulty in ascribing a definition of a ‘live music’ event that is universally accepted and replicable across different studies. This problem is endemic across all evaluations of musical activity.

The Scottish Government’s Key Sector Report (2009), for example, gives an estimate of GVA for categories within the arts but lumps ‘Music and Visual Performing Arts’ into a single sub-sector⁴. The DCMS Economic Estimates reports, likewise, conflate music with ‘visual and performing arts’⁵. They also note that:

*Even at the highest resolution of detail available in the ONS data we use, live music is counted alongside theatre in a single category. There are also challenges related to capture of micro-businesses and the inaccurate classification of music businesses in the ONS business registry that underpins the Annual Business Survey on which GVA estimates in this release are produced.*⁶

These issues are not specific to Scotland or the UK but present themselves internationally in assessments of the creative industries. In Australia, Arts Victoria’s assessment of the *Economic Impact of the Victorian Arts and Cultural Sector* has a category for ‘Music Composition and Publishing’ which contains (as per Australian Culture and Leisure statistical classifications):

- Music composition
- Music publishing
- Record companies and distributors, and sound recording studios
- Recorded audio and video media retailing

¹ UNESCO Institute for Statistics, (2012), *Measuring Cultural Participation: UNESCO Framework for Cultural Statistics Handbook No.2*, p.11

² *ibid.*

³ Scottish Government (2013), *Scotland’s People Annual Report, Results from 2012: Scottish Household Survey*, p.135

⁴ Scottish Government (2009), *Key Sector Report*, p.19.

⁵ DCMS *Economic Estimates 2015*, p.10

⁶ DCMS, (2015), *Creative Industries Economic Estimates January 2014: Statistical Release*, p.29

Complications arise from the fact that 'Copyright collection agencies', 'Arts education', and 'Recorded music manufacturing' are in another overarching category – 'Other Arts'.

As elsewhere, this complication also applies to live music, which is included in 'Performing Arts', with separate sub-categories for 'Music performance', 'Music theatre and opera', and 'Performing Arts Venues'.⁷

In Austin, Texas, an assessment of the economic impact of its cultural sector, notes the importance of the live sector, but broadly lumps music related activities together, whereby music includes production, music video, industry, tour, and recording services, performers, and commercial music⁸. Given the significance of South By Southwest to Austin, the report does differentiate between music related tourism and other tourism but as with the Scottish figures, there are ambiguities around what *exactly* constitutes music employment. The Austin report's appendix singles out 'Music Directors and Composers', 'Musicians and Singers' and 'Sound Engineering Technicians' within 'Arts Related Occupations' as per the official federal figures produced by the Bureau of Labor Statistics, but warns against comparing these directly with the primary research conducted for the report.⁹

Even estimates produced by industry bodies with considerable access to primary data and the resources to produce detailed analyses are prone to variation. Music industry campaigning and lobbying group UK Music's reports on the value of the music industry illustrate this point. Taken consecutively, they point to potentially differing interpretations.

Released in December 2013 and September 2014 respectively, UK Music's reports show the GVA of live music increasing from £662million to £789million and the recorded sector decreasing from £634million to £618million. Taken in the context of other reports (such as those produced by PRS for Music)¹⁰, the 2013 UK Music report might indicate a narrowing of the gap between recorded and live revenues, whilst the 2014 report indicates that the gap is increasing.

The potential discrepancy is revealed in the methodology. The 2014 report explains that,

"Due to unprecedented engagement by the music industry, we have significantly increased the number of survey responses and raw data that this analysis is based upon compared with last year. In particular, the number of surveys completed by musicians increased by 260 per cent, moving from 250 in 2013 to 900 in 2014. We complemented these 900 survey responses with anonymous responses from a number of accountants to leading musicians, which is a data source that we did not access last year"

Likewise, "[O]ur analysis of the live music industry crucially depends upon accessing ticketing data and for the *first time* [emphasis added], we were able to draw upon ticketing data held by the BBC for live music events (e.g. the BBC Proms). We are grateful to all those who have shared their data with us to enable this analysis."¹¹

Since there is methodological transparency, this does not undermine the value of the reports themselves. It does, however, suggest that these kinds of figures should be handled with care and

⁷ KPMG (2013) *Economic Impact of the Victorian Arts and Cultural Sector*, p.27

⁸ Austin Texas Gov/TXP Inc. (2012) *The Economic Impact of the Creative Sector in Austin*, p.4

⁹ Austin Texas Gov/TXP Inc. (2012) *The Economic Impact of the Creative Sector in Austin*, pp. 30-31

¹⁰ PRS for Music produced a series of widely cited reports *Adding Up the Industry* between 2009 and 2011 <http://www.prsformusic.com/aboutus/policyandresearch/researchandconomics/pages/default.aspx>

¹¹ UK Music (2014), *Measuring Music*, p.8

due consideration of their background, particularly if they are to be used longitudinally against one another to establish overall patterns.

We note also the discrepancy between UK Music's estimates of GVA at £634m and £789m for live music across the UK and Biggar Economics' estimation of GVA at £194 millions for a sub-set of Edinburgh's cultural venues alone – this would be close to 20% of UK Music's valuation of live music across the country and, again, highlights the dangers of comparing reports because of the different methodologies used.

Again, this is not to criticise either report in and of itself, but merely to note that definitive economic statements of value are often contingent. PRS for Music's reports *Adding Up the Industry* were widely used as indicators of the state of the UK's music industries; however, the methodology was in a constant state of refinement. For instance,

*"This year, we've made significant methodological advances, the most important of which is within the UK music publishing business. We now value UK music publishing direct revenues at almost £250m, a significant upward revision."*¹²

We noted at the outset of this report that there is scope for refining our own methods in the future studies – a common practice, yet one which has a direct bearing on 'headline' figures. Ultimately, then, the findings by individual studies undertaken in specific locations, and by specific organisations, need to be considered against their wider context. The cultural field at large and music specifically involve a degree of complexity and pace of change that mean headline figures should be approached with caution.

No study is immune to these problems but taken in aggregate and considered carefully, they allow for the kind of methodological refinement described above. Additionally, and crucially, they point to the need to bear in mind the effects and relationships in play *beyond* raw economic data. The 'cultural value' of live music is even harder to quantify than its economic counterpart, but is ultimately as important – or more so¹³. As our team noted in a report in 2014 on the cultural value of live music in the UK, such research points to the need for dialogue between musicians, music industry practitioners and policymakers¹⁴. Such dialogue will be fostered by qualitative data on cultural value; our own work and that of the academic community will endeavour to provide this.¹⁵ Despite the difficulties inherent in pulling out definitive statements, such work can nevertheless help to inform specific discussions to which it pertains and it is our hope that the quantitative and qualitative data we have provided will help to give voice to the music community in Edinburgh to further such dialogue.

¹² Will Page and Chris Carey, (2011) *Adding Up the Music Industry for 2010*, PRS for Music

¹³ Behr, A., Brennan, M., and Cloonan, M. (2014): *Cultural value and cultural policy: some evidence from the world of live music*, *International Journal of Cultural Policy*, DOI: 10.1080/10286632.2014.987668, p.14

¹⁴ Behr, A., Brennan, M., and Cloonan, M. (2014), *The Cultural Value of Live Music from the Pub to the Stadium: Getting Beyond the Numbers*, AHRC/University of Edinburgh/University of Glasgow, p.24 http://www.research.ed.ac.uk/portal/files/16546029/The_Cultural_Value_of_Live_Music_From_Pub_to_Stadium.pdf

¹⁵ See, for instance, the work undertaken as part of the Arts and Humanities Research Council funded Cultural Value project:

<http://www.ahrc.ac.uk/research/fundedthemesandprogrammes/culturalvalueproject/>

<http://www.ahrc.ac.uk/documents/project-reports-and-reviews/the-ecology-of-culture/>

Notable work in this area and dialogue with stakeholders is also a feature of the Warwick Commission on the Future of Cultural Value:

<http://www2.warwick.ac.uk/research/warwickcommission/futureculture/>

Mapping and describing the music industries

The difficulties in assessing the precise state of play for live music in Edinburgh are considerable. As the first exercise of its kind in the UK, many of the findings in this report are necessarily approximate and we have deliberately erred on the side of caution rather than over-inflate our estimations.

To place our findings into context, we compare them here with results from other work with an emphasis on reports and data specific to Edinburgh. We have not attempted a comprehensive literature review here of all work carried out on the live music industries in the UK¹⁶.

The reasons for this are fourfold. Firstly, the dynamic and fast-shifting nature of the sector means that the pace of change makes like-for-like comparisons difficult. We have also therefore primarily concentrated our comparative work in this section on relatively recent reports (those within the last 6 years).

Secondly, and perhaps more importantly, much of the previous work that has been carried out both on the music industries in general and on live music specifically does not disaggregate data at city level but tends to focus on the overall UK level, or in other cases the Scottish context. For instance, Creative Scotland's *Music Sector Review*¹⁷ provides a useful overview of the picture at Scottish level but, by its very nature as a review, takes a broad ranging rather than granular approach often referring to external sources for detailed statistics and information. In addition, the methodology deployed in these sources is not always clear

Thirdly, as we shall illustrate below, methodological and definitional variations naturally produce variant results even when granular data are available. An older mapping report of the music industry in Scotland, produced for Scottish Enterprise in 2003, calculated that:

*[T]he employment generated by the live music industry in Scotland is equivalent to 279 full-time jobs and 684 part-time jobs [and] that the income generated by the live music business (promoters, venues, agents, festivals, technical service providers and freelance individuals) is £45,130,000.*¹⁸

This, however, deliberately concentrated on businesses whose specific and sole priority was music, not the wider group of places in which live music activity takes place (such as pubs or cafes). The 2003 mapping exercise's focus on the 'music industry' meant that it regarded pubs putting on music without charging an entry fee "will show up with virtually no income, as their return is an indirect one through the sale of beer"¹⁹. By contrast, we have attempted to fill the gap in previous studies by taking into account these very venues due to the sheer amount of musical activity that takes place in them. For instance, the Census showed that 46% of the 267 venues which regularly or occasionally host live music in Edinburgh are pubs – while there may not be a door entry, the consumption of food/drink is still a significant part of the economic activity around live music.

¹⁶ We have used the plural here. Martin Cloonan and John Williamson argue that, given the different sub-sectors (e.g. recording, publishing, live) with often convergent interests, it is more productive to think of music 'industries' than the more commonly used 'industry', which implies a singular monolithic entity. Williamson, J. and Cloonan M. (2007), 'Rethinking the music industry', *Popular Music*, 26:2, pp.305-322, doi:10.1017/S0261143007001262

¹⁷ Creative Scotland/EKOS, (2014) *Music Sector Review: Final Report for Creative Scotland*

¹⁸ Williamson, J., Cloonan, M. and Frith, S. (2003), *Mapping the Music Industry in Scotland: A report*, Scottish Enterprise/Queen Margaret University/University of Glasgow/University of Stirling, p.37

¹⁹ Williamson, J., Cloonan, M. and Frith, S. (2003), *Mapping the Music Industry in Scotland: A report*, Scottish Enterprise/Queen Margaret University/University of Glasgow/University of Stirling, p.37

This is not to suggest that one approach is better than the other, just to point out that the underlying approaches and audiences (e.g. stakeholders whose primary concern is the broader economy, such as Scottish Enterprise, or those with a more direct involvement in the musical ecology, like the venues and musicians of the capital city) will affect the outputs.

Even with its music specific focus, the Mapping Report of 2003 noted that secondary/tertiary live music industries such as ticket agencies muddy the waters making it, “exceptionally difficult to establish either the turnover or relevant proportion of turnover attributable to music of these agencies, as to varying degrees, they all sell tickets for non-music events (e.g. football matches, theatre, carnivals, etc)”²⁰. Likewise, the working and employment patterns of technical crew make it “difficult to ascertain the percentage of their work that stems from live music”²¹ or mapping in general.

Further differences emerge when one takes into account the eventual economic and social metrics used. For instance, neither the 2003 mapping exercise or our own project has expressed the value of live music as Gross Value Added (GVA) to the economy of the city or country. By contrast, UK Music’s reports on the Economic Contribution of the Core Music Industry and Biggar Economics’ assessment of the impact of Edinburgh’s cultural venues *do* take an approach that highlights GVA. Again, no sole method has a unique claim to inviolability but this does highlight the inherently tricky nature of large-scale mapping.

This relates to the fourth reason behind a relatively tight remit to this comparative section, which is that the form, methodology and outputs of any study will necessarily be driven and affected by the nature of its authors and purpose. That is, government bodies, industry bodies and academics each have different sets of priorities in terms of how the approach the work and what they hope to achieve²². There are also different constraints and opportunities afforded by their various funding streams, timelines, publication methods and primary audiences.

Nevertheless, we believe that a consideration of context is important, that the findings of prior reports on the cultural life of Edinburgh have a bearing on our own project and so we outline some of the findings below that pertain to our own live music Census.

Attendance

The Edinburgh People Survey (carried out by the City Council’s Business Intelligence Unit) states that 33.1% of Edinburgh residents have attended live music or a concert, outside of the Festivals. (Total number of respondents 5,125²³)

Based on a population (over 16 years old) of 417,322²⁴ this would suggest that approximately 138,133 people attend live music or concerts in a given year.

²⁰ Williamson, J., Cloonan, M. and Frith, S. (2003), *Mapping the Music Industry in Scotland: A report*, Scottish Enterprise/Queen Margaret University/University of Glasgow/University of Stirling, p.32

²¹ Williamson, J., Cloonan, M. and Frith, S. (2003), *Mapping the Music Industry in Scotland: A report*, Scottish Enterprise/Queen Margaret University/University of Glasgow/University of Stirling, p.32

²² For a more detailed explanation of these differences and their tensions, including those that arose around the 2003 Mapping Report, see: Williamson, J., M. Cloonan and S. Frith. (2011) ‘Having an Impact? Academics, the Music Industries and the Problem of Knowledge.’ *International Journal of Cultural Policy* 17:5, pp. 459–474.

²³ City of Edinburgh Council (2014) *Edinburgh People Survey Headline Results*, p.95

²⁴ <http://www.nrscotland.gov.uk/files/statistics/council-area-data-sheets/city-of-edinburgh-factsheet.pdf>

However, much here will depend on the definition of 'live music' or 'concerts'. For instance, our survey and observational activities included pubs at which musicians or a DJ were playing. In most cases, these did not involve a ticket or cover charge (only 19% of venues on Census night were charging an entry fee). For many audience members, the music may not have been the primary driver of attendance.

It should be recognised that the boundaries between a live music event and other types of social activity are porous. It is likely that a proportion of respondents in the Edinburgh People Survey may not have viewed going for a drink at a pub where a folk session was on as attendance at live music or a concert, particularly if that was not their primary purpose for the visit. For some participants, a folk session may be viewed as much as a social activity as a musical one. Nevertheless, it is plausible that one or more people at the event would have been paid for playing live music or, at least, that the venue in question would regard live music as a driver of trade.

This is increasingly so when one tries to extract the financial data described above from information about attendance. First of all there is the difficulty of obtaining accurate and detailed statistics about rates of pay for staff and musicians, since these are often confidential and commercially sensitive. Beyond this, at a given event (especially one without tickets or cover charge), the financial relationships in play become harder to ascertain.

For instance, a significant number of live music nights are of the 'open mic' or 'folk session' variety. In city centre pubs which host live music several times a week, one or more of these is likely to be an 'open' session. The musicians at these may not be paid. Or the 'host' of the 'open mic' will be paid but not all of the performers. Even where they are paid, this may be 'in kind' (a free beer for performing, for example).

This becomes further complicated when one takes into account that the host may *also* be a member of staff of the venue. Likewise, at such events, the boundaries between 'audience' and 'performers' are also porous.

Figures from the **Scottish Household Survey**²⁵ for live music attendance in Edinburgh differ slightly from the Edinburgh People Survey.

The Scottish Household Survey figures from 2013 (from a base of 750 respondents) notes that:

- 40% of adults had attended a 'Live music event - e.g. traditional music, rock concert, jazz event (not opera or classical music performance)' within the last 12 months.
- 14% of adults had attended a 'Classical music performance / opera' within the last twelve months.

Based, again, on an adult population of 417,322 this would suggest that approximately 166,900 attended music events (non-classical) and approximately 58,400 attended classical music and opera.

Our audience survey suggested an average of six live music events per month, usually two (2.1) ticketed concerts/festivals, three (2.8) non-ticketed pub/club events, and one (1.4) ticketed club event per month. (See page 60)

²⁵ Scottish Government (2013), *Scotland's People Annual Report: Results from 2013, Scottish Household Survey – Local Authority Tables Edinburgh City*, Fig. 13.2, p.102
<http://www.gov.scot/Resource/0046/00469269.pdf>

We hoped to correlate our own estimates of live music attendance against Scottish Household Survey statistics for these categories in Edinburgh but its own report noted that its '[b]ase numbers at local authority level are too small to produce this analysis'.

Frequency of attendance at Scottish level (from a base of 2,800 responded) noted the frequency of attendance as follows²⁶:

Adults	At least once a week	Less often than once a week / at least once a month	Less often than once a month / at least 3-4 times a year	Twice in the last 12 months	Once in the last 12 months	Don't know	Total
Live music event - e.g. traditional music, rock concert, jazz event (not opera or classical music performance)	2%	10%	30%	31%	27%	0%	100%
Classical performance or opera	1%	8%	25%	30%	35%	1%	100%

With our average figures of attendance at musical events at 6 times per month (more than once a week) it would appear that Edinburgh residents attend more live music than Scotland as a whole by a considerable margin (only 2% of Scots in general attending non-classical performances at least once a week).

Several factors must be considered here.

It is likely that Edinburgh's residents *do* attend more live music than the Scottish average, particularly given the presence of the Festivals. Evidence provided by digital insight organisation Culture Republic²⁷ to the Leith Creative report *Understanding Leith's Cultural Resources and Creative Industries* bears this out.

Leith Creative's report used data collected by Culture Republic from 46 Scottish venues and organisations in total over the 2013/14 financial year²⁸. This refers to cultural attendance at large, not just music, and is taken from box office data from multi-art form venues across Scotland. It can therefore only be taken as broadly suggestive of music specific attendance but nevertheless does

²⁶ <http://www.gov.scot/Publications/2014/08/7973/13>

²⁷ See page 18 for a fuller explanation of Culture Republic's role.

²⁸ Leith Creative (2015), *Understanding Leith's Cultural Resources and Creative Industries*, p.17 http://www.leithcreative.org/wp-content/uploads/2015/05/REPORT_web.pdf

imply that it is at least plausible that Edinburgh residents attend more than the Scottish average, as per a comparison of our findings with the Scottish Household Survey.

According to this sample, the Leith postcodes EH6 and EH7 accounted for 1.8% of total attendance in Scotland. Even with approximate estimates, Leith accounts for less than 1.8% of Scotland's population²⁹.

Furthermore, the Leith postcodes do not even have the highest attendance in the city. In this dataset all of the top five postcodes for attendance were in Edinburgh. Since this refers to multi-art form venues we cannot draw any firm conclusions from this about attendance at music events but it does suggest, as do our findings regarding higher attendance at live music than indicated in Scottish Household Survey statistics for Scotland in general, that Edinburgh residents go to more cultural events than the norm for the region.

Ranking in terms of attendance [by postcode]³⁰:

- 1) EH4³¹
- 2) EH10
- 3) EH6 ranked 3rd highest
- 4) EH3
- 5) EH7 ranked 5th highest

Likewise, *frequency* of attendance at cultural events was higher than the Scottish average.

Frequency of Attendance (EH6/7 combined)

- 56% attended once (compared to Scottish average of 76%)
- 17% attended twice (compared to Scottish average of 11%)
- 8% attended three times (compared to Scottish average of 5%)
- 5% attended four times (compared to Scottish average of 3%)
- 13% attended five or more times (compared to Scottish average of 6%)

When *types* of attendance are broken down, Leith postcodes are, similarly, shown to attend more than the Scottish average.

Using data from Experian Ltd. on propensity to attend cultural events, the Leith Creative Report notes the following for Leith postcodes in comparison to Scotland.³²

²⁹ The estimated total population of Scotland in 2013 was 5,327,700. The population of EH6 and EH7 according to national census data from 2011 is 73,364, or 1.4% of the Scottish total and with the area around Leith Walk having the highest population density in Edinburgh. Another metric, based on a population of just under 57,000 in the Leith and Leith Walk electoral wards would put it at 1.1% of Scotland's total).

³⁰ Leith Creative (2015), *Understanding Leith's Cultural Resources and Creative Industries*, p.17 http://www.leithcreative.org/wp-content/uploads/2015/05/REPORT_web.pdf

³¹ The EH3 postcode covers parts of the New Town, Stockbridge, the West End, Tollcross and Fountainbridge. EH4 includes addresses in the Dean Village, Comely Bank, Barnton, Craighleath and stretches to Cramond. EH10 includes addresses in Bruntsfield, Morningside and Fairmilehead

³² It is a different metric, based on ticket revenue rather than attendance, but Creative Scotland's *Music Sector Review* also notes that "Scotland accounts for 11% of the UK's live music revenue (greater than its 8% share of the UK population". This figure is based on 'Scotland Feature' from the trade publication *Music Week* 25 November 2011. We do not have the methodology upon which this figure is based). Creative Scotland/EKOS (2013), *Music Sector Review*, p.12

Percentage of EH6 & EH7 who said they attended a 'Performance' in 2013 compared to Scotland as a whole³³:

Performances attended by adults 15+	EH6	EH7	Scotland
Ballet	17%	16%	10%
Opera	17%	16%	10%
Jazz concerts	19%	18%	10%
Classical concerts	25%	23%	16%
Popular/rock concert	64%	61%	46%

The limitations of these data make it difficult to draw concrete conclusions about the actual attendance of Edinburgh audiences in Edinburgh. The Culture Republic sources do not differentiate between musical and other events, and include data from venues across Scotland even though they focus on the residence of audiences. Likewise, the data supplied by Experian and the Scottish Household Survey does not indicate the location of the events attended. Nevertheless, they support the broad conclusion that Edinburgh residents attend cultural events, including live music of different kinds, more frequently than in other parts of Scotland.

Another factor to take into consideration when assessing the data on Edinburgh residents' attendance at live music events is the definition of a 'live music' event. This is not a trivial matter. Our own survey deliberately adopted a broad ranging definition in an attempt to capture hitherto scant information about what goes on in pubs, restaurants and cafes whose primary classification would not be regarded as a 'music venue' but which nevertheless use music as a driver of trade.

Consequently, its remit is rather wider than those investigations that produced findings based on specific and more heavily circumscribed groups of venues or events (such as Culture Republic's data for Leith Creative). It is also the case that respondents' answers are affected by the way that questions are framed or events categorised.

Number of venues

The City of Edinburgh Council Venue Report (2009) notes a total of 73 venues³⁴ that are able to cater for cultural provision with a minimum capacity of 200. Our estimate of venues that put on live music of some kind suggests that there are 88 venues with a capacity of 200 or more.

However, it should be noted that the key proviso here is what counts as 'cultural provision'. We have included nightclubs, which will predominantly feature DJs, and also large pubs that are unlikely to feature touring acts and will more likely focus on cover bands. As Frith et al state, 'our definition of "live" music includes music on records provided by disc jockeys for dancers and audiences gathering in public places. This might seem a distortion of terms ... but venues combining live and recorded music are an important part of [live music history]'³⁵. It is unlikely, for example, that the Ghillie Dhu – a West End pub with regular live music – would feature in accounts of 'cultural' venues. Yet it provides consistent employment for musicians.

Another issue here is the fluidity of *how* venues are used. Since the 2009 report there has been a rise in the use of non-traditional venues to host pop/rock events. It is difficult to ascertain without

³³ Leith Creative (2015), *Understanding Leith's Cultural Resources and Creative Industries*, p.18
http://www.leithcreative.org/wp-content/uploads/2015/05/REPORT_web.pdf

³⁴ City of Edinburgh Council (2009), *Edinburgh City Cultural Venues Study*, p.ii

³⁵ Frith, S., Brennan, M., Cloonan, M., Webster E. (2013), *The History of Live Music in Britain, Volume 1: 1950-1967*, Farnham: Ashgate 1, p. xi

further research the extent to which this is a consequence of the loss of spaces in which such events were traditionally held (e.g. The Venue, Calton Road) or of an increase in demand.

Economic Impact

Biggar Economics notes that Edinburgh's cultural venues support over 3,200 Full Time Equivalent (FTE) jobs in the city and contribute £156 million Gross Value Added (GVA) in the city's economy³⁶.

This is in comparison to our more conservative estimates but two factors must be taken into account here. Firstly, that the Biggar Economics report "includes all the additional jobs supported in the economy by Edinburgh's Cultural Venues"³⁷. Secondly, the figures in that report pertain to a very specific subset of venues. As noted above, the definition of 'culture' is key in this regard. Furthermore, the Cultural Venues Impact report includes venues for which music is not a feature (e.g. the Filmhouse, Royal Lyceum Theatre) or only incidentally a feature (e.g. Museums and Galleries).

Live music related impacts, then, are only a segment of the 3,200 FTE jobs ascribed to the *overall* subset of 'Cultural Venues' in the city – the National Museum of Scotland alone accounts for 1,627 of these³⁸. We lack the resources to produce a full account of economic multipliers and leakage from our own estimates. Nevertheless it seems fair to say that it is likely that the GVA and employment impacts are likely to be considerably larger than the figures from our enumerated survey of the 45 venues from which we extrapolated 76 FTE jobs on the night of the Census itself, a broader estimate of 259 FTE jobs extrapolated from our online survey (paid at least £2.6 million annually), and our estimated £40million annual spend on live music events.

Biggar Economics concentrated on a specific sub-set of venues in their findings. Culture Republic's *Rock and Pop Analysis May 2015*, by contrast, focuses on genre.

Culture Republic provides audience information, marketing services and digital tools and data to cultural organisations in Scotland. A registered charity, it receives funding from City of Edinburgh Council, Creative Scotland and Glasgow City Council. Amongst its outputs are reports to illustrate trends in cultural consumption such as the "location, booking patterns and digital habits of cultural audiences"³⁹ to inform the strategy of the sector. Whilst making use of detailed box-office returns, its recent report on rock and pop in Edinburgh is based on a limited dataset. It indicates that ticket sales alone for the Top 20 Rock and Pop events from responding venues who supplied Mosaic data to the report provided annual revenues of just over £1.5 million⁴⁰ with sales for the Top 20 events within 'other music' coming to a little over £5.4 million⁴¹ in financial year 2013/14.

This includes multiple performances of some events (such as Susan Boyle) and includes Festival Events. (For instance 25 performances by 'Mike Oldfield', which presumably refers to the Festival Show 'Mike Oldfield's Tubular Bells for Two').

Nevertheless, given that these figures come from just 40 named events in total, it does support the contention in both Biggar Economics' and our own estimations that the actual figures returns from live music are considerably higher than those stated.

³⁶ Biggar Economics (2014) *Edinburgh's Cultural Venues Impact 2013-2014*, p.1

³⁷ Biggar Economics (2014) *Cultural Venues Report Technical Appendix*, p.9

³⁸ Biggar Economics (2014) *Edinburgh's Cultural Venues Impact 2013-2014*, p.12

³⁹ <https://www.culturerepublic.co.uk/about/>

⁴⁰ Culture Republic (2015), *Rock & Pop Analysis in Edinburgh 2015*, p.12

⁴¹ Culture Republic (2015), *Rock & Pop Analysis in Edinburgh 2015*, p.12

For example, an estimated £90,000 spent on ticket sales alone from the night of our census multiplied across 50 weeks gives a figure of £4.5million and this is *without* any major events at key venues such as the Queen's Hall, Usher Hall, the Corn Exchange or Murrayfield.

The Culture Republic report also illustrates the difficulty in trying to make hard and fast genre distinctions. Culture Republic, for instance, list 'Hot Dub Time Machine', 'The Rat Pack', 'The Wellington International Ukulele Orchestra' and a cappella group 'The Magnets' (whose repertoire is based on popular music) under the catch all heading of 'other' alongside a list that predominantly contains classical music. Arguably such acts could sit more easily within 'Pop and Rock', certainly as regards their repertoire, where – say –Burt Bacharach's easy listening pop could as easily sit amongst 'Other' as jazz pianist Hugh Laurie.

Culture Republic's account, then, is a reminder of the problems of making accurate assessments even with access to granular data. It is more difficult still to achieve a detailed picture as well as an overview when the field of focus is an entire city.

Conclusions and Notes for Further Work

The picture provided by both this pilot study and an assessment of other work is of an active and thriving live music ecology in Edinburgh. However, a live music ecology is not merely constituted by its venues, performers and audiences. It includes less directly quantifiable factors, such as the regulatory environment, educational and infrastructural factors. It is beyond the limited scope of this report to comment on all of these. We do note, however, that the licensing regime in Edinburgh appears to be having a 'chilling effect' on provision of live music at smaller venues and pubs.

This problem is not unique to Edinburgh by any means and we also see that sections of the City of Edinburgh Council are sensitive to it. (As we have noted elsewhere, there is a problem of 'joined up' thinking on this matter, not just in Edinburgh but across the country)⁴².

A spate of venue closures, or changes of use, in recent years has brought about a common sentiment that Edinburgh is a city with a crisis surrounding live music outside of the glut of activity outside of the festivals. Our research does not quite bear this out. More musicians responded that the amount of gigs they are playing is static or increasing (a total of 65%) than decreasing. Likewise, venues responding to our online survey generally reported an increase in attendance over the past 12 months, with only 2% reporting a decrease.

The overall findings are rather more ambiguous, however, than this would suggest. Whilst just under half of venues (44%, see page 34) suggested that they are happy with the amount of live music that they put on, 15% cited logistical constraints with 20% suggesting that they would like to put on more music but do not think it would be financially viable. Furthermore, sentiment amongst musicians told a different story, with the most respondents (46%, see page 86) saying that they felt the overall scene is shrinking as opposed to static (35%) or growing (19%).

Given that Edinburgh audiences appear to attend music, and other cultural events, more often than the Scottish average, the overall picture is not one of a music scene in acute crisis, but rather one hampered by an underlying brake, preventing it from reaching its full potential.

⁴² Behr, A., Brennan, M., and Cloonan, M. (2014), *The Cultural Value of Live Music from the Pub to the Stadium: Getting Beyond the Numbers*, AHRC/University of Edinburgh/University of Glasgow, p.24 http://www.research.ed.ac.uk/portal/files/16546029/The_Cultural_Value_of_Live_Music_From_Pub_to_Stadium.pdf

To properly account for this, more longitudinal work will be needed. Likewise, to fully assess the situation in Edinburgh, comparison with other cities using data gathered in a similar fashion would be beneficial. To this end – and particularly since the issues faced by Edinburgh venues, promoters and musicians are not unique – the pilot study we have carried out here should be replicated elsewhere, taking account of methodological lessons learned in this case. (See Notes on Methodology section below).

However, there are actions that the City Council, and indeed the Scottish or UK governments, could take to alleviate existing issues.

Work is underway by the City of Edinburgh Council to reassess its cultural policy, and we note that the Desire Lines initiative includes several recommendations that pertain to city's music community, notably working to adopt an "enabling culture for licensing of events and venues"⁴³ and "ensure that local artists and cultural producers have easy-access routes to present and promote their work all year round"⁴⁴.

We note also that the Council is reviewing the clause in its licenses that requires amplified music to be 'inaudible' in neighbouring premises and suggest that in light of its 'chilling effect' on live music, changes in this area would be welcome.

More widely, we suggest that looking towards the adoption an 'Agent of Change' principle to safeguard against future urban development in an already crowded residential centre leading to further problems for the live music scene would be a step towards removing the braking effect that Edinburgh's licensing regime and high density of residential living in the city centre are having.

Whilst it would be more difficult to introduce such a principle with regard to existing venues, we nevertheless believe that foregrounding the need for finding an accommodation between the rights of residents and those of musicians and venues would be a step forward in realising the further potential of Edinburgh as a music city. Promoting awareness of the value of the economic *and* cultural value of live music to the city could benefit residents, venues and musicians alike.

⁴³ Desire Lines (2015), *Desire Lines: A Call to Action from Edinburgh's Cultural Community*, p.13
http://desirelines.scot/DesireLines_booklet_SCREEN.pdf

⁴⁴ Desire Lines (2015), *Desire Lines: A Call to Action from Edinburgh's Cultural Community*, p.13
http://desirelines.scot/DesireLines_booklet_SCREEN.pdf

Edinburgh
Live Music Census 2015



Chapter 2
Notes on Methodology

CHAPTER 2: NOTES ON METHODOLOGY

Conducting the census on the night

On the day/night of the Census itself our researchers visited 45 of these events/venues and have data about the Census date from an additional 13; in the days before and after the actual Census, we therefore visited 58 of the total venues in Edinburgh which hosted live music on the Census night.

This was based on the model of the Victorian Live Music Census. Although our study was smaller in scale, we adopted their key methods to trial them in the UK. Like the Melbourne team, we recruited student volunteers to visit as many venues as possible on the Census night who would then encourage musicians and audience members to complete online surveys and, where possible, to gather information from venue staff about the venue's operation. As in Melbourne, our Census takers were given a record sheet for each venue visited.

To trial the model in Edinburgh, our questions were based on those used in Victoria (e.g. the number of staff employed in the venue, the number of patrons and the number of musicians). We also based our online surveys largely on the Victorian Census but adapted them slightly to allow for the different geographical context and on trialling the surveys with the Musicians' Union, venue operators and the Music Venue Trust.

To maximise the return on the audience survey, we also provided Census takers with hard copy surveys that they could distribute and collect in the venues they visited where it was appropriate⁴⁵. Staff at venues and events also distributed hard copy surveys to their customers across the weekend of the Census which we collected the following week.

As we did not visit all the venues, it has been difficult to gain an entirely accurate picture of live music activity in Edinburgh, although this pilot study offers a useful platform on which to build future research, and it must be remembered that this study is the first live music census of its kind in the UK.

Conducting the online surveys

As we have written elsewhere⁴⁶, we believe that an 'ecological' model is a useful one for considering live music in a city (or other locality). While this implies a somewhat more complex and nuanced understanding than that provided by the raw numbers of economic analysis, it also raises a host of methodological and definitional issues that a straightforward census of activity cannot address. We therefore sought to supplement the Census itself with surveys of musicians, venues and audience members in the city.

- The musician survey was a detailed online questionnaire, promoted to Edinburgh musicians via the research team's networks, across social media and, crucially, by the Musicians' Union.

⁴⁵ We had also had a team of volunteers with hard copy surveys ready to gather audience data at the Meadows Festival on Saturday 6th June but it was unfortunately cancelled due to high winds.

⁴⁶ Webster, E. and Behr, A. (2013), 'Live Music 101 #6 – What makes for a 'healthy' musical city?', *Live Music Exchange* website, <http://livemusicexchange.org/blog/live-music-101-6-what-makes-for-a-healthy-musical-city-emma-webster-and-adam-behr/>

Behr, A., Brennan, M., Cloonan M., Frith S. and Webster, E. (in press), 'Live concert performance – an ecological approach', *Rock Music Studies*.

- A detailed online venue survey was also emailed to venues across the city, to supplement publicly available data and information gathered from visits to venues on the day of the Census itself, and the days preceding and following it.
- These venue visits involved a shorter questionnaire containing both fields that could be filled in by observation on the part of Census takers (such as the number of musicians playing), and those that – where possible – could be answered by staff members (such as whether the venue has had any noise or other issues). Additional data to ascertain the regularity with which venues host live music was gathered by further email requests and by analysis of venues’ social media pages⁴⁷.
- Finally, we surveyed audience members and the public. This involved hard copy surveys handed out at events visited on the day and night of the Census and distributed by staff in venues over that weekend. It also involved an online survey, with identical questions, promoted across social media, email and linked to via an STV report on the Census project.

Through combining these different strands, we hope to have provided a rounded picture of the ‘everyday’ musical life of Edinburgh. Of course, each comes with its own advantages and pitfalls. Broadly speaking, a quantitative approach sacrifices nuance in favour of broader coverage, whilst a more qualitative approach (such as the use of in-depth case studies) gathers more rounded evidence but at the expense of requiring a narrower focus.

Indeed, a DCMS report into ‘*The feasibility of a live music economic impact study*’⁴⁸ noting the pros and cons of each approach goes further when it deals with the practical issues surrounding assessing the potential costs and benefits of a live music performance, observing that “in practice, it may not be feasible to measure all of them. In particular, some public and indirect costs and benefits may be difficult to quantify; in these cases it would be necessary to use qualitative analysis.”⁴⁹

With this in mind – and due to limited resources that precluded an analysis of substitution, leakage and displacement effects⁵⁰ – we have not sought to account for the economic or social additionality of live music but circumscribed our findings to those that can be directly drawn from our primary research.

Methodological considerations arising from the Edinburgh pilot census and lessons for future research

Conducting a census of live music on one night of the year in order to understand the live music ecology in Edinburgh is an inherently paradoxical task. On the one hand, a census gives a snapshot of live music activity on one night of the year, from which can be drawn tentative conclusions about activity throughout the year if combined with evidence from venue staff and with live music listings in the press and online. On the other hand, it has been absolutely clear from our ongoing live music research that there is no such thing as a ‘typical’ night of live music activity, especially in a city such as Edinburgh, which over the summer swells to host one of the largest arts festivals in the world.

⁴⁷ In many cases, particularly with those venues for whom live music is an occasional or semi-regular feature but not a standard offering at set intervals (e.g. weekly, fortnightly or monthly), we averaged the extent to which venues’ websites and social media pages showed a live music event across 2015. We discounted extra dates during the festival to provide an approximate figure to align with those venues from which we had first hand accounts or more definite figures from listings.

⁴⁸ Frontier Economics/DCMS (2007), *The feasibility of a live music economic impact study*, p.7

⁴⁹ Frontier Economics/DCMS (2007), *The feasibility of a live music economic impact study*, p.20

⁵⁰ Frontier Economics/DCMS (2007), *The feasibility of a live music economic impact study*, p. 15

Methodologically, a live music census is also problematic. For starters, where does one draw the line as to what counts as 'live music'? Should nightclubs on Lothian Road be included in the survey, for example?⁵¹ How about karaoke? Where does one draw the boundary of Edinburgh – which venues should be included and which should not? What are the most useful ways of defining location – is it useful to consider venues within the World Heritage Area and those without, for instance, or by neighbourhood community areas or community council?

Similarly, trying to compile a comprehensive list of live music events on any one night is also surprisingly difficult – research from listings guides such as *The List*, *The Skinny*, *7 Ahead* and the *Gig Guide* shows that there were 80 live music events on Saturday 6th March in Edinburgh (some were hosting more than one gig on the day as part of the Leith Jazz and Blues Festival). However, there were also 6 venues visited by our researchers which were hosting some form of live music activity on Saturday 6th June but which did not appear in the listings, illustrating that even to measure live music activity on *one* night is problematic.

The definition of a live music venue is also problematic. Even noted venues that occupy a significant place in Edinburgh's musical ecology – such as the Corn Exchange or Murrayfield Stadium – are not used exclusively for music and, indeed, may not be used even *primarily* for music. Others, such as the numerous pubs on the Royal Mile and Grassmarket feature live music several times a week but barely show up on the radar of cultural surveys and accounts of Edinburgh's music scene, despite providing consistent work for local musicians.

Addressing a gap both in the literature and in any existing data regarding these hitherto largely hidden 'bread and butter' venues – and their subsequent value to the city – was one of the spurs for this project for a number of reasons. Firstly, these are spaces – rather than the large venues – that provide year round work for resident musicians. Murrayfield, Usher Hall, the Corn Exchange *et al* are, rather, the key centres for medium to large-scale *touring* acts. Likewise, the city's festivals like the Jazz and Blues Festival, Edinburgh International and Fringe festivals, often feature higher profile visiting acts. The value of the festivals and 'tentpole' events like stadium gigs are widely acknowledged. Our concern was to assess the role of what Professor Ruth Finnegan's landmark work dubbed 'the hidden musicians'⁵² and the spaces that feature them.

Secondly, although we note that there is no such thing as a 'typical' night, our concern was to examine live music activity throughout the year rather than at peak periods. This did not mean discounting larger venues but it did mean that the bulk of the events on the night in question were at the smaller 'bread and butter' spaces rather than 'headline' venues.

Thirdly, it is the smaller venues – in Edinburgh and across the UK – that are suffering most in the current regulatory and financial climate⁵³. This issue is certainly not unique to Edinburgh, but it has been a marked concern of the music community (notably venues, musicians and promoters) over

⁵¹ Our live music research team has always considered both music played by DJs and music played on 'real' instruments as 'live' music – venues combining live and recorded music are an important part of the ecology of live music in any location, particularly given that the boundaries have blurred between DJs and 'other' musicians. Many acts often feature both DJs and 'traditional' instruments and the rise of the DJ as producer and headline artist is a growing feature of the digital music environment. Whilst it was beyond the scope of this project, nor our intention, to assess the entire night-time economy's use of music, we counted those venues that had live DJs on site specifically to play music (as opposed to music choices being made by bar staff or recorded music from other sources).

⁵² Finnegan, R. (1989), *The Hidden Musicians: Music-making in an English Town*, Cambridge: Cambridge University Press

⁵³ Behr, A., Brennan, M., and Cloonan, M. (2014), *The Cultural Value of Live Music from the Pub to the Stadium: Getting Beyond the Numbers*, AHRC/University of Edinburgh/University of Glasgow, p.24

the last couple of years. The City Council appears to be aware of this issue: in 2014 it convened a large public meeting to thrash out key issues with the music community and set up working groups to deal with a year round music strategy in general, and the 'inaudibility clause' in its licensing regime – a particular bone of contention – specifically⁵⁴.

Research of this nature is also an on-going task. This project was formulated as a pilot study for what we intend will be a larger study. As such, and as with any research project, our methodology will evolve. We discuss specific methodological points throughout in relation to the specific data points, and address questions of methodology and underlying definitions in more detail in Chapter 4. Here we raise some of the specific issues that arose and aspects of how we can refine our methodology in future work and with larger resources.

- Start the volunteer recruitment process earlier and engage local press at an earlier stage in order to help publicise the Census;
- Collect advertised gig activity noted from street press advertising over a longer period and sample throughout the year;
- Amend the phrasing of some of the questions in order to give more specific answers – for example, rather than giving the option of 'Since we started' in the 'For how long have you featured live music?' question, give a definite number (0-6 months, for example);
- Use an offline survey app to collect the data rather than hard copy questionnaires – this would speed up the data collection and data analysis process and also mean that the problems would be avoided that were caused by respondents being able to choose more than one response when the question specifically asked for only one response. Hard copy surveys for audience members allowed us to maximise our resources by leaving them in venues and collecting them later but they also meant that we were unable to direct respondents as they filled out the survey.
- Assign each venue a unique code in order to negate the problems of nomenclature, e.g. whether a venue is 'The X' or just 'X';

We would like to have included with this report a map of venues with capacity size, regularity of live music events, contact points, type of music featured, etc. However, to maximise uptake – and because we also wanted to gather data about commercial and potentially sensitive matters (like levels of trade and licensing issues) – we promised to anonymise and aggregate all of the data. With more time and person hours, we could deploy a method that separates questionnaires for venues into two parts – those that required anonymity and those that, in conjunction with more longitudinal analysis of listings, would allow us to map venues. This would also help establish a benchmark for a repeated exercise to track the growth or shrinkage of provision over time.

⁵⁴ http://www.edinburgh.gov.uk/news/article/1705/edinburgh_agrees_live_music_matters

Edinburgh

Live Music Census 2015



Chapter 3

Venues

CHAPTER 3: EDINBURGH LIVE MUSIC CENSUS VENUE SURVEY: OVERVIEW

Based on 267 venues which regularly or occasionally host live music and DJs⁵⁵ – from The Wee Red Bar to Murrayfield Stadium – and including data from 41 online surveys⁵⁶ (using the Bristol Online Survey tool) and 76 venues which were visited in person on or after the Census night – Saturday 6th June 2015⁵⁷ – our typical live music venue⁵⁸:-

Is in the Old Town of Edinburgh (and the Old Town community council), and within the World Heritage Area.

Is a pub or bar which has a capacity of 147⁵⁹ and hosts live music four nights a week. The venue most likely doesn't also hold DJ nights but if it does, these will most likely be on Saturdays.

Will most likely host solo artists and original bands who will be playing rock, folk and pop.

Opened in its current form more than ten years ago and started featuring live music more than ten years ago.

Has a full-time member of staff for whom live music booking is one amongst other duties. When the venue is booked by an external promoter, this is most likely to be artists/managers who are promoting themselves.

Uses Facebook, posters (own/in-house promotions team), and word of mouth to promote live music events, and believes Facebook and word of mouth to be the most effective means of promoting live music events.

Has a private hire space which can be hired for live music – the hire cost will be around £126.

Is busiest on Fridays and is busiest during the Festival period.

Is likely to open at 12 noon and to close at 1am.

Does not sell tickets online and does not usually have a door charge (81% didn't have a door charge on the night of the Census but 20% of venues charge for entry 100% of the time).

Is happy with the amount of music currently put on and has seen an increase in audiences for live music over the last 12 months.

Is unlikely to have had any external funding for venue or live music related activities, but if it has, will most likely to be project specific support from Creative Scotland.

⁵⁵ The Victorian Live Music Census only took into account venues which hosted live music two or more nights per week. However, in Edinburgh this would discount venues such as the Murrayfield Stadium, which, while musically inactive for the majority of the year, at 67,144 capacity, forms a significant live music venue on the rare occasions that it does host gigs.

⁵⁶ The 41 venues which responded to the online survey included a broad range, from small Leith pubs, through established city centre music venues, churches, traditional and folk pubs through to large major key venues within the city.

⁵⁷ NB There were some venues which were both enumerated and which completed an online census.

⁵⁸ Figures in italics on this page relate to the database of 267 venues – figures not in italics relate to the online and enumerated surveys only.

⁵⁹ This is the average capacity of pub/bars based on 123 pubs/bars (46% of 267 total). The majority of venues are between 100 and 199 capacity. The median capacity of all 267 venues is 150. The arithmetic mean is 760, but this is skewed because of venues like Murrayfield Stadium, which has a capacity of 67,144.

Is about as likely as not to have been affected by noise, planning or development issues.⁶⁰ Noise issues are the most likely issue if currently affected but noise issues are most likely to have stayed the same over the past 12 months.⁶¹

⁶⁰ This is based on responses from 52 enumerated venues for which we have data on the question: 'Have you been affected by noise, planning or development issues?'

⁶¹ This is based on data from the 36 venues which responded to this question in the online survey only: 'Are you *currently* [author's italics] affected by any of the following?'

SECTION 3A: Edinburgh overview

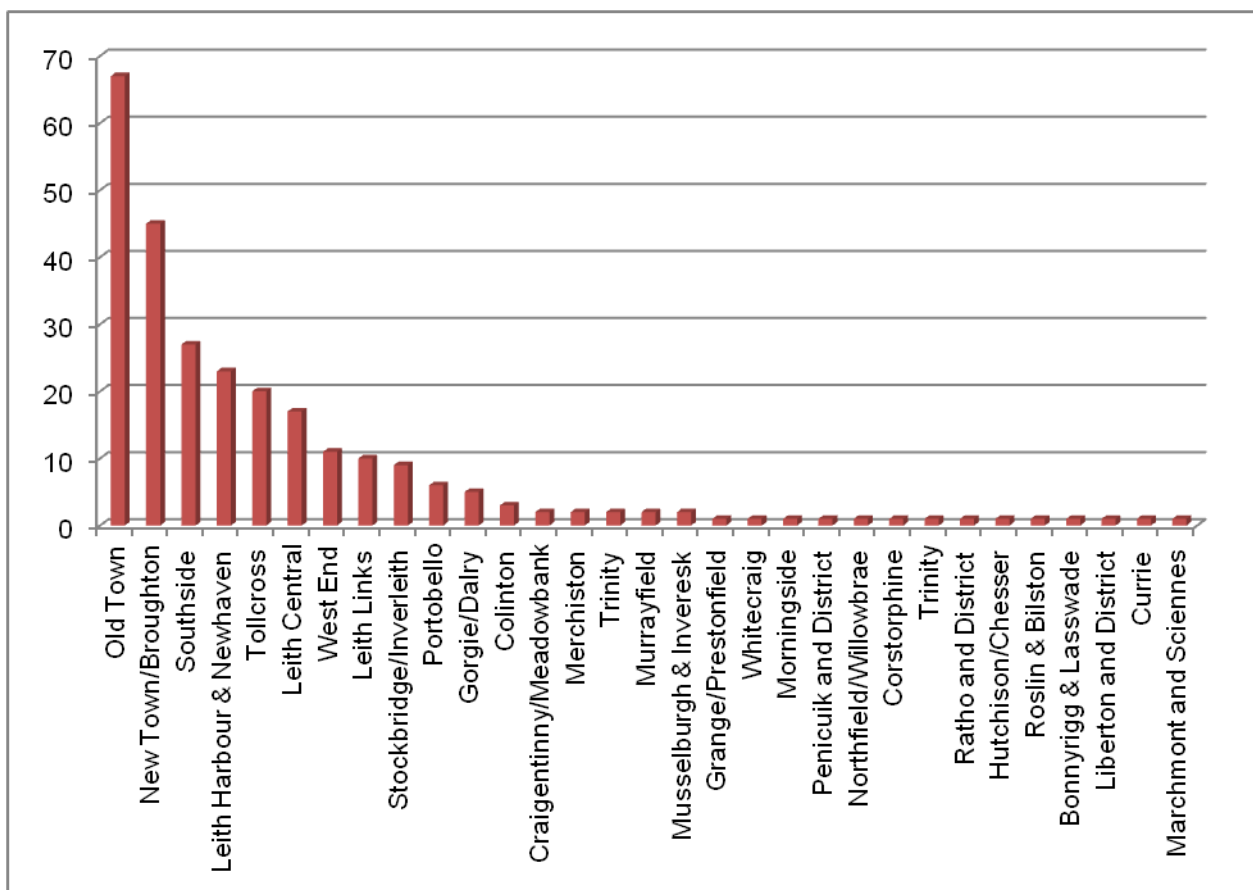
The Census shows that there are 267 venues in and around Edinburgh which offer live music and/or music played by DJs.⁶² Of these, 94 offer music a minimum of 2 nights per week. In addition, 116 offer music on an occasional basis with music as a partial part of their offering rather than a key driver. One such venue is Murrayfield Stadium, which has a capacity of over 67,000 and hence has a significant impact on the live music ecology if a live music event is on, but for whom music is obviously not its primary use.

NB Saturday 6th June was outwith the Edinburgh festival season, and therefore did not feature any of the major festival events which form a major part of Edinburgh’s arts calendar over the summer.⁶³

Location of venues (by community councils)

Venues are concentrated in the Old Town and New Town/Broughton (42%).

NB the chart shows count of venues rather than percentages.

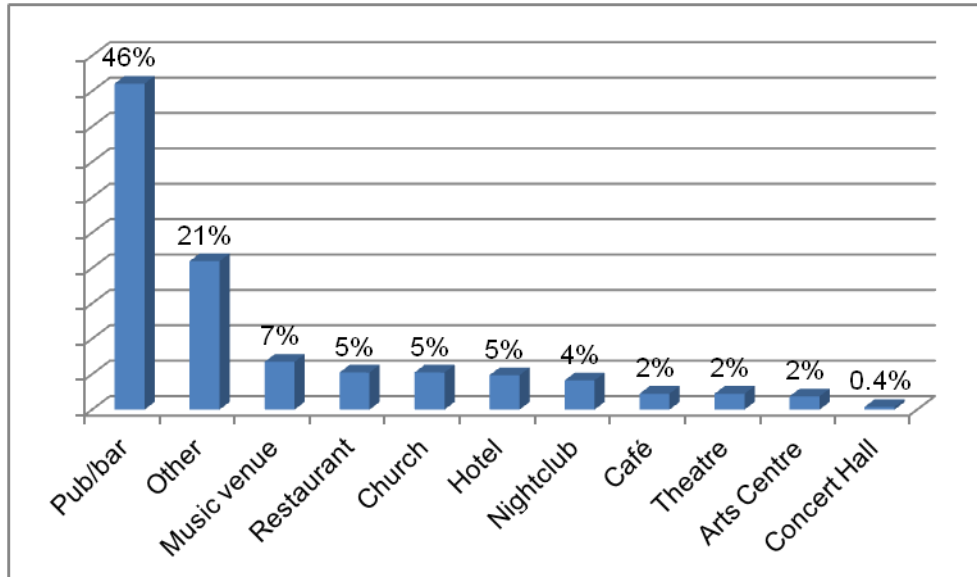


⁶² Figures in this section relate to the overview of 267 venues rather than the enumerated census or online survey.

⁶³ NB the Edinburgh Festival Fringe contains only 16% musical events (music 13%, musicals and opera 3%), whereas the Edinburgh International Festival contains a higher proportion of music (including opera) but the programme which also contains theatre, dance, and art
https://www.edfringe.com/uploads/docs/About_Us/Fringe%20Annual%20Review%202014.pdf

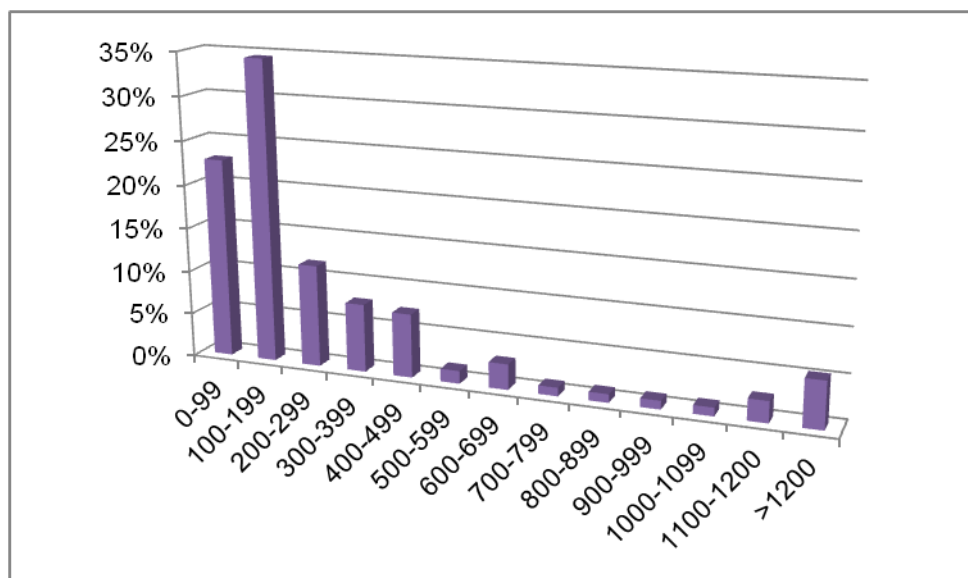
Types of venue

The most prevalent types of venue in Edinburgh are pub/bars (123 in total or 46%). It should be pointed out that one finding of our research is that it is surprisingly difficult to categorise music venues neatly. For example, should the Queen's Hall be classed as a concert hall (like Usher Hall) or a music venue (like The Bongo Club)?



Venue capacity overview

The biggest sector is venues between 100 and 199 capacity.⁶⁴ The median capacity of all 267 venues is 150. The arithmetic mean is 760, but this is skewed because of venues like Murrayfield Stadium, which has a capacity of 67,144.⁶⁵

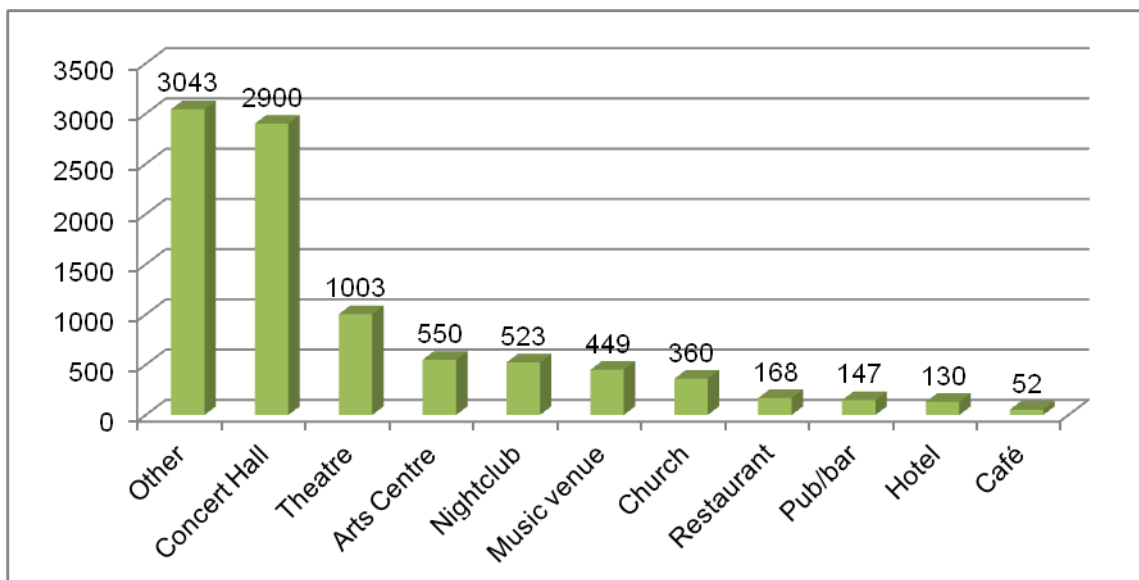


⁶⁴ We obtained 77% of the capacity data for the 267 venues, which comes from a variety of sources including: directly from the venues themselves via the census (34%), other internet source (22%), Edinburgh City Council: www.edinburgh.gov.uk/.../item_5d_-_scottish_liquor_licensing_statistics_2006_and_premises_licences_2010 (18%), The List (15%), and email from the venue (10%).

⁶⁵ The next highest capacity venue is the Royal Highland Centre, Ingliston, at 12,000.

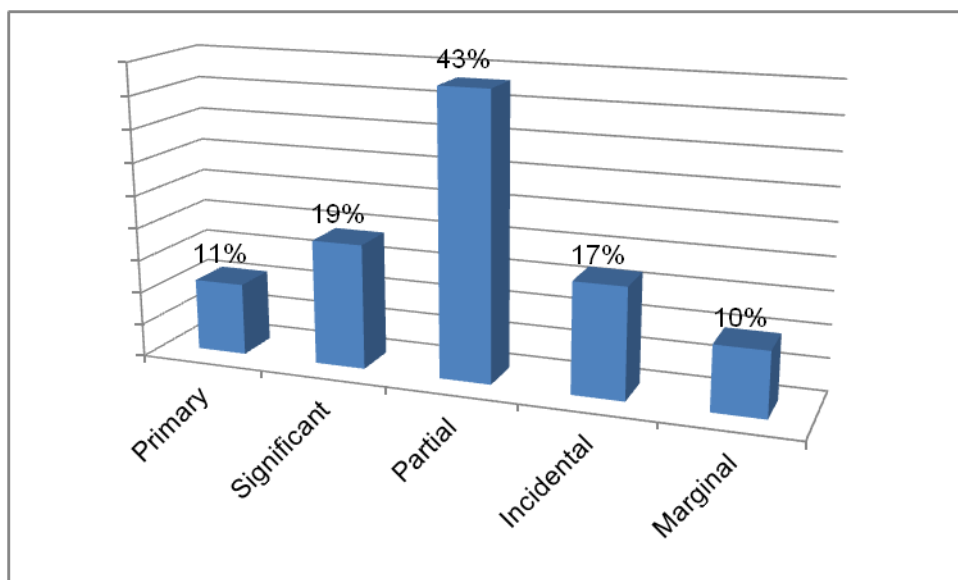
Average capacity by venue type

The category of 'Other' includes venues such as Murrayfield Stadium, Edinburgh Corn Exchange and Edinburgh Zoo, all of which have a function which is not primarily music-related but, because of their size, have a significant impact on the music capacity of Edinburgh when they are in use. NB the chart shows capacity of venues rather than a percentage of the total – figures relate to average capacity for each venue type.



Significance of live music within venue

For the majority of venues which feature some form of live music (whether live musicians, DJs, or both), music is not the primary focus of the business.



The categorisation is as follows:-

PRIMARY: live music is a key part of the offering.

SIGNIFICANT: the venue does other things as well but music is a significant driver (live music 2+ times a week on a regular basis). If live music is not 2+ times a week, then hires/lets for gigs, or appeal for music a significant selling point.

PARTIAL: hosts live music regularly but is not intrinsic to the business or a main selling point. 1-2 events per week or more but fewer than 2 per week on average.

INCIDENTAL: hosts music but only as a background activity or occasionally. Not listed in gig guide, little promotion and on an occasional basis.

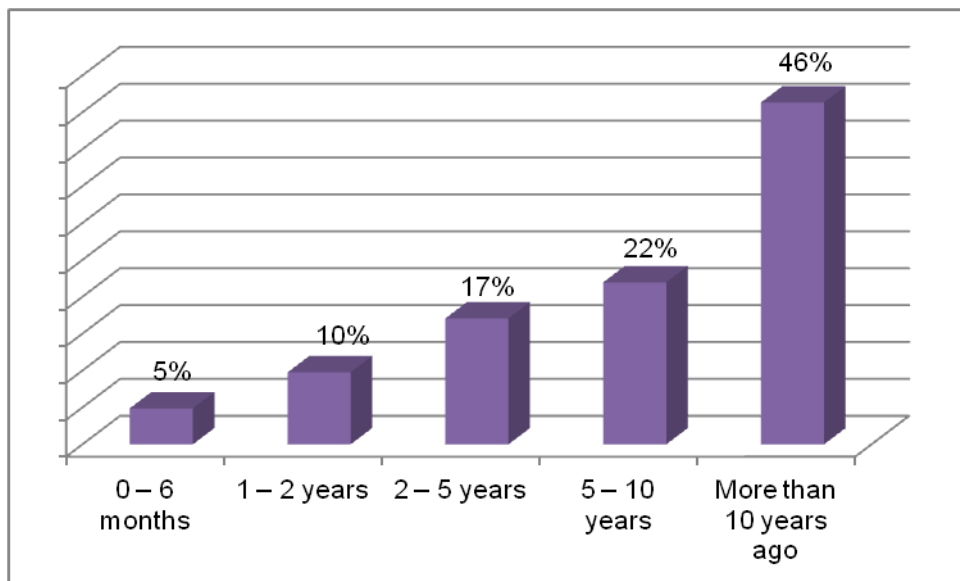
MARGINAL: has the capacity to host music and does so on occasion but not known for music and makes little of it.

It should be noted that, the categorisation of the 267 venues into the five categories was carried out by the authors and does not come directly from the venues themselves, therefore this chart is indicative of live music's significance to venues rather than definitive. Another finding of the Census is that classification of live music venues in this way is naturally ambiguous, fluid, and subjective.

SECTION 3B: Venue overview

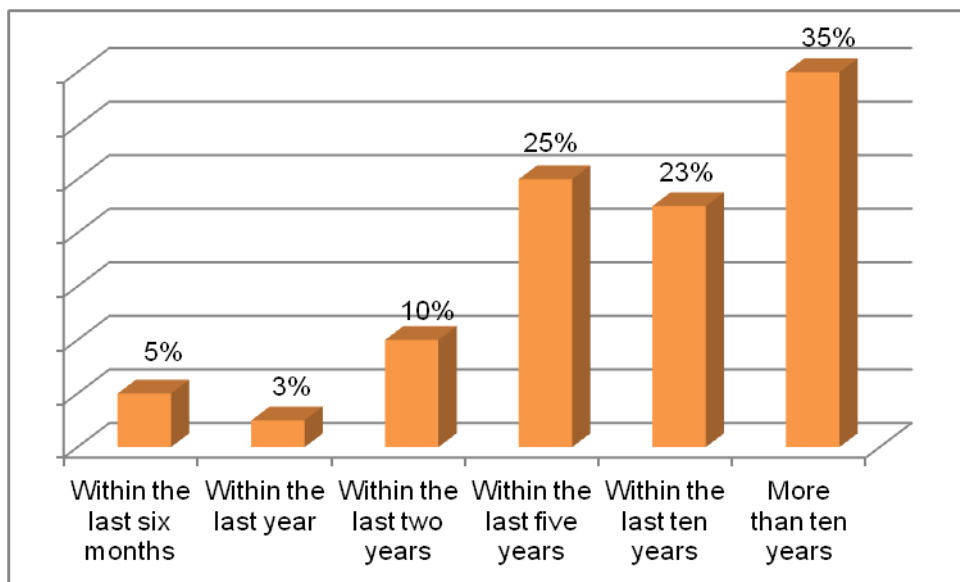
Length of time venue open in its current form

The average length of time that venues have been open is 8.2 years. 46% have been open for more than 10 years.⁶⁶



When did the venue start featuring live music?

The average length of time that venues have featured live music is 7.1 years. 35% have featured live music for more than 10 years.⁶⁷

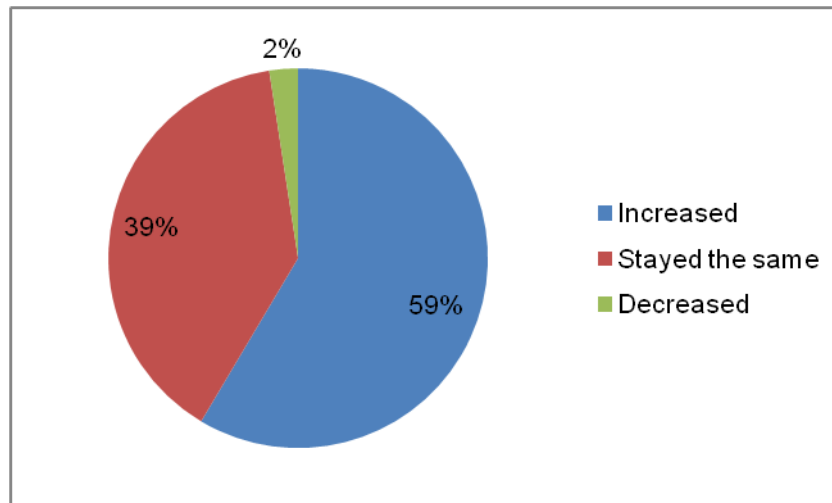


⁶⁶ Figures in this section come from the online survey of 41 venues.

⁶⁷ NB The venues which answered 'Since we opened' for this question have been amended to match the answer given for the previous question about the length of time the venue has been open.

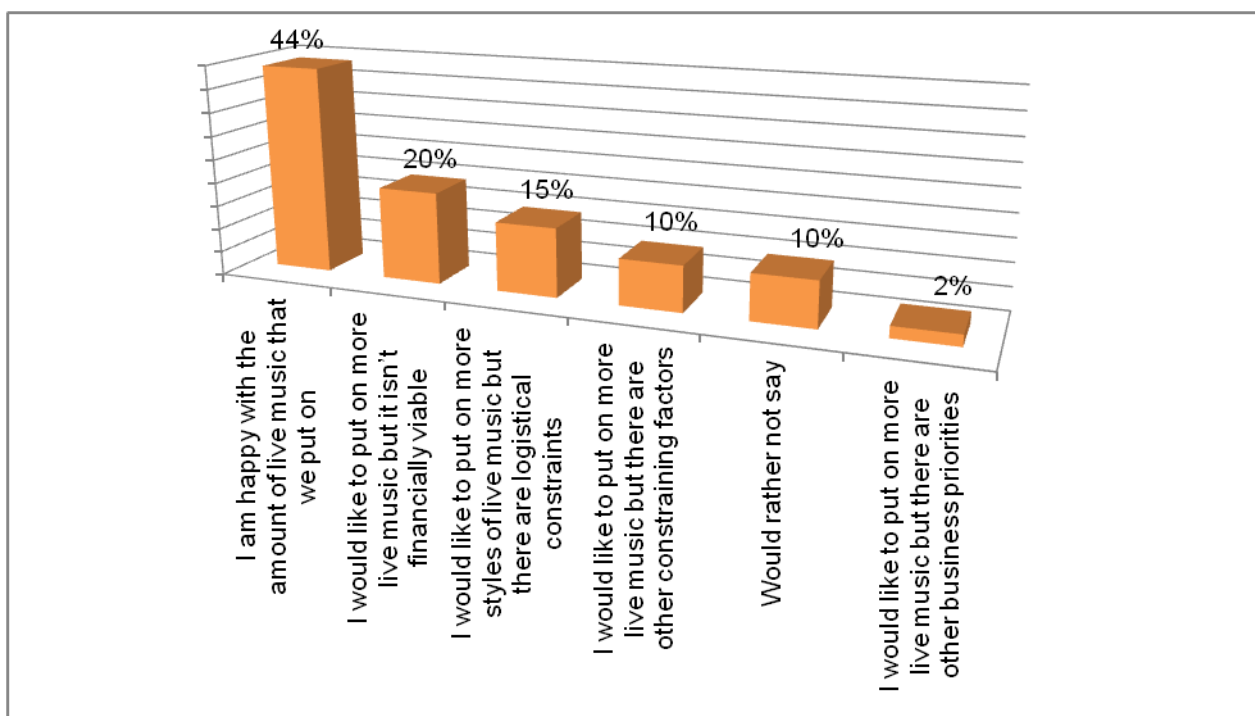
Changes in attendance over the past 12 months

From the 41 venues which took part in the online survey, the majority have seen an increase (59%) or no change (39%) in the attendance for live music in their venue. Note that this contrasts with the musician survey on p. 86, in which musicians believe the Edinburgh live music scene to be shrinking. If the number of venues across the city has been shrinking, then one possible explanation for this increase is that the remaining venues have taken up the slack.



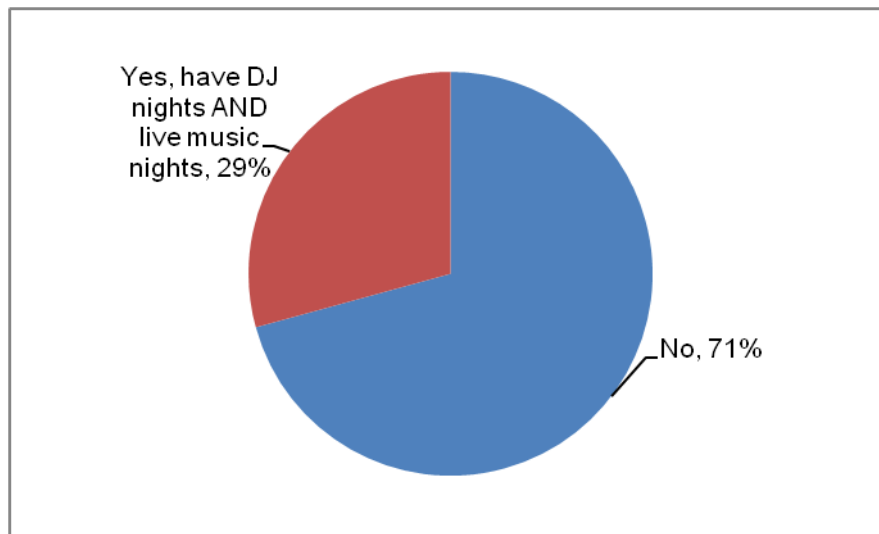
Current live music situation

When asked which statement best describes their situation, most venues responded that they are happy with the amount of live music that they currently put on (44%). For those who would like to put on more live music, there are factors which prevent them from so doing, namely live music not being financially viable (20%) or other constraining issues such as licensing issues or neighbours (10%); some would like to put on more *styles* of music but there are logistical constraints such as the size of the venue (15%).



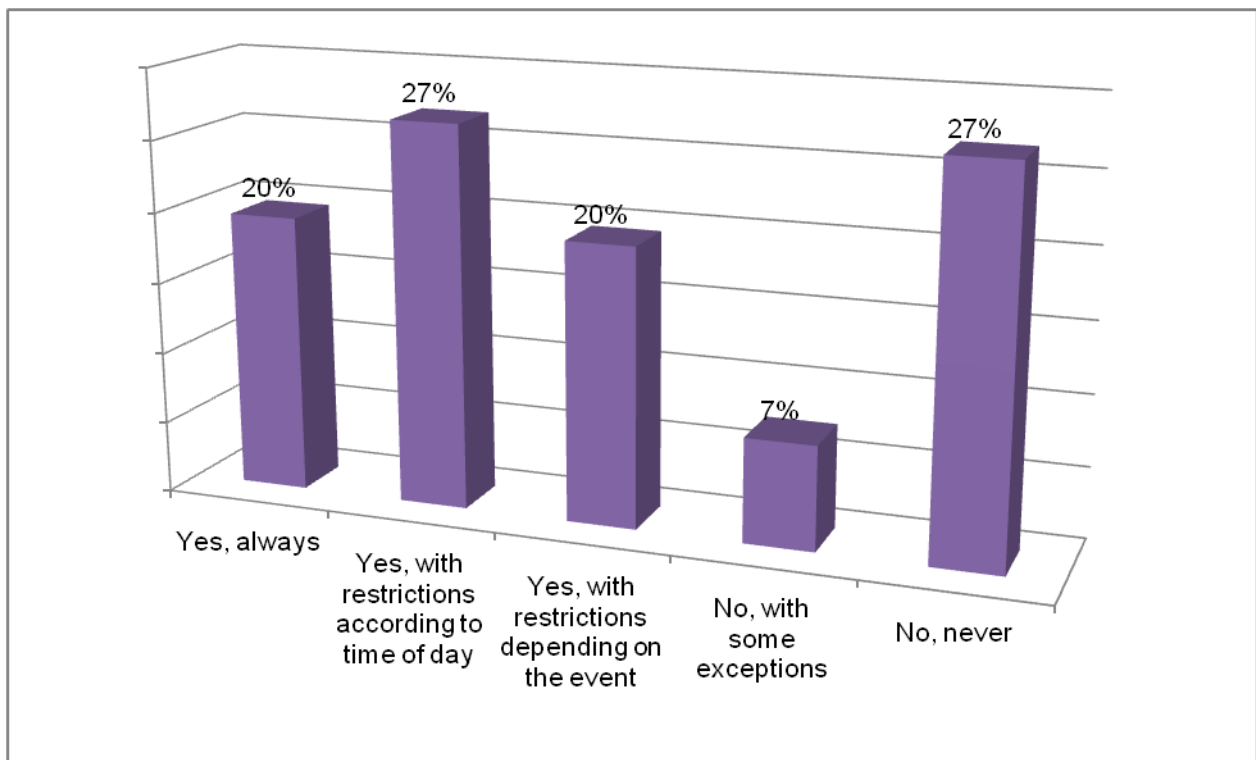
DJ events

From the online survey, the majority of venues do not host DJ nights as well as live music nights (71%). For those that do host both, for only 8% do the DJ nights subsidise the live events and 22% have club nights with live DJs in the same venue on the same night after live music events.



Age restrictions

Live music and alcohol have become intrinsically linked and the sale of alcohol on site necessarily restricts access to live music – it is also worth highlighting the high proportion of pubs which play host to live music in Edinburgh (46%) and hence the inevitable restrictions for under-18s. Only 27% of venues have no restrictions whatsoever on who can attend.



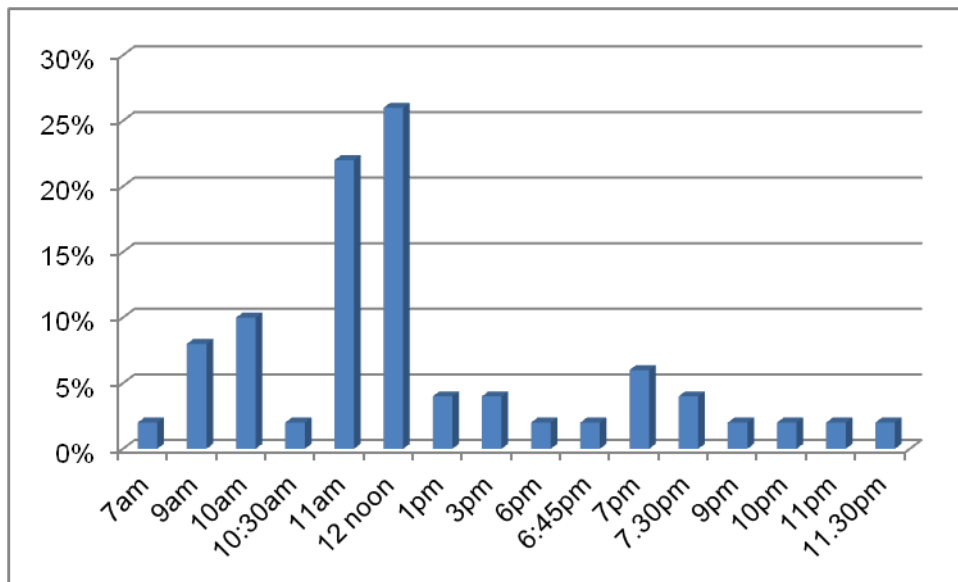
SECTION 3C: Census night

Music genre on the night of the Census

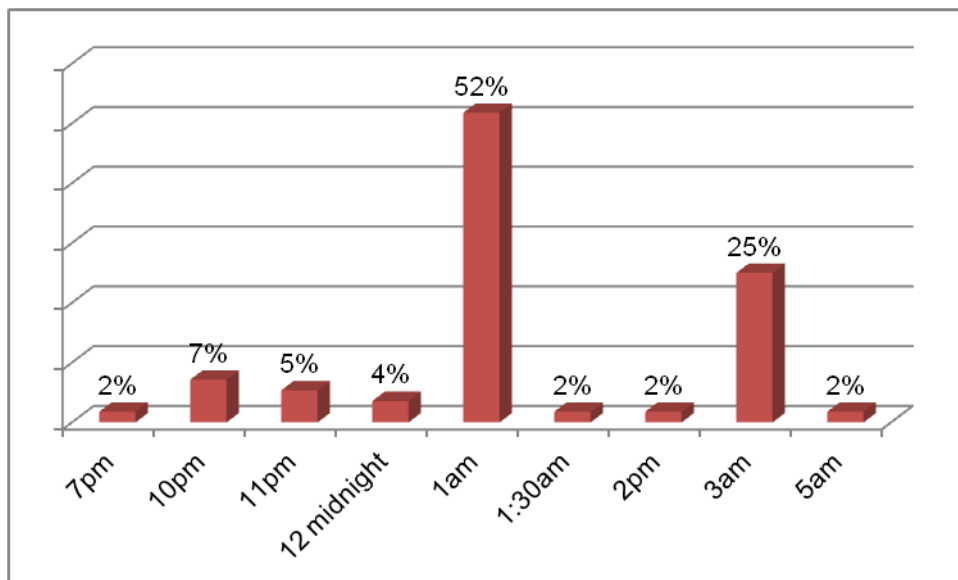
Rock (28%), folk (21%), pop (17%) and traditional Scottish (14%)⁶⁸ were the most prevalent music genres playing on the night of the Census in the enumerated venues (or at the time of the enumerator's visit).⁶⁹

Opening times on the night of the Census

Most venues opened at 11am (22%) or 12 noon (26%).



Most venues closed at 1am (52%).



The average length of time for which venues were open on the day/night of the Census was 12 hours (11.6 hours).

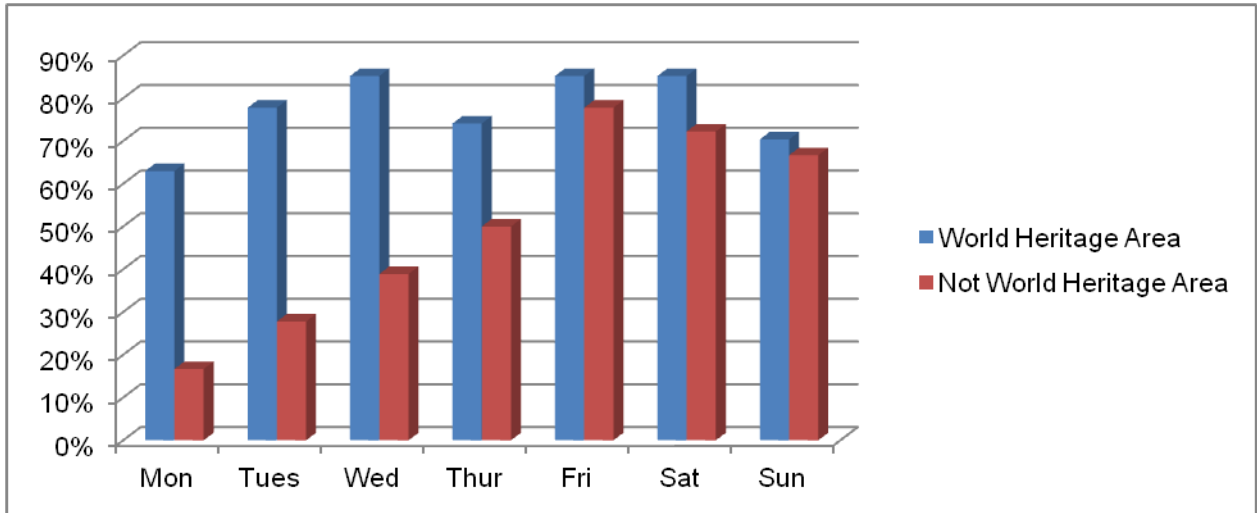
⁶⁸ NB note the subjective nature of this task in that one enumerator's 'folk' could be another person's 'traditional Scottish'. Similar issues arise across genres for enumerators, venues and musicians. The dividing line between, for instance, 'rock' and 'blues' or 'pop' is far from clear-cut.

⁶⁹ Data in this section comes from the enumerated census.

SECTION 3D: Weekly and annual activity of live music offered by venue

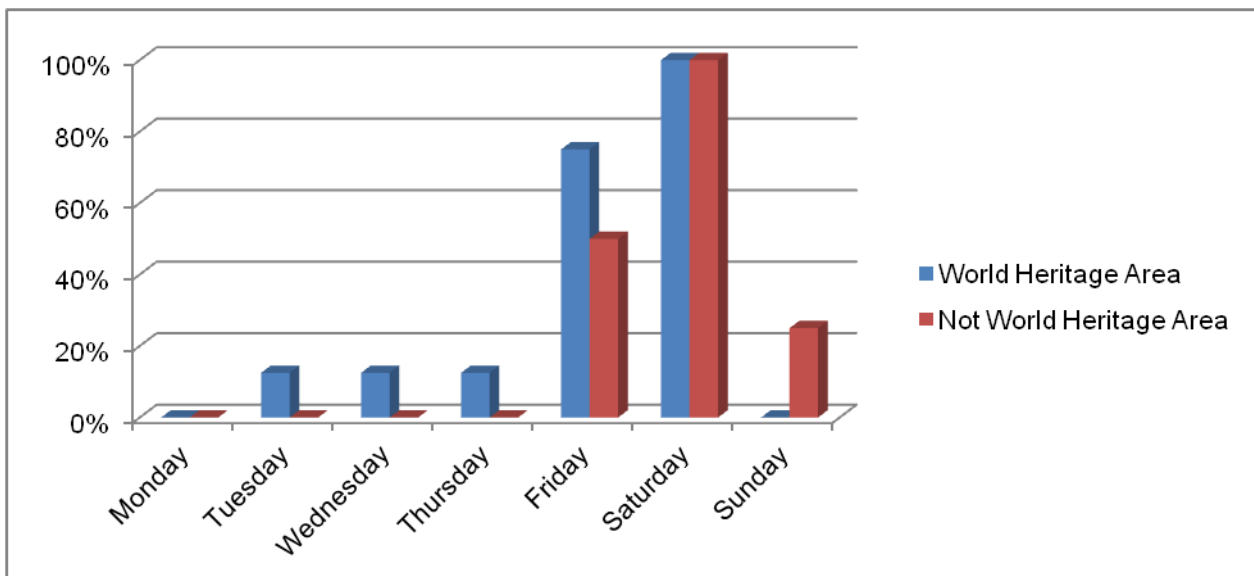
Weekly Activity: Musicians

For this chart,⁷⁰ it is interesting to note the difference in weekly activity between venues within the World Heritage area and those outside, as there is a significantly higher rate of live music activity in the World Heritage area, particularly around the beginning of the week. It is unclear as to why Thursdays appear to be slightly less musically active than Tuesdays or Wednesdays in the World Heritage Area, a question which merits further research.



Weekly Activity: DJs

It is interesting to note that DJs appear to be a predominantly weekend form of live music provision. Venues which do offer DJs are virtually certain to host them on a Saturday night, slightly less likely to host them on a Friday, but very unlikely to host them on any other day of the week (apart from Sundays).⁷¹ Note also the slight difference between the World Heritage area and that outside, wherein venues within the World Heritage area are more likely to host DJs in general.



⁷⁰ Data for these two charts comes from 45 enumerated venues.

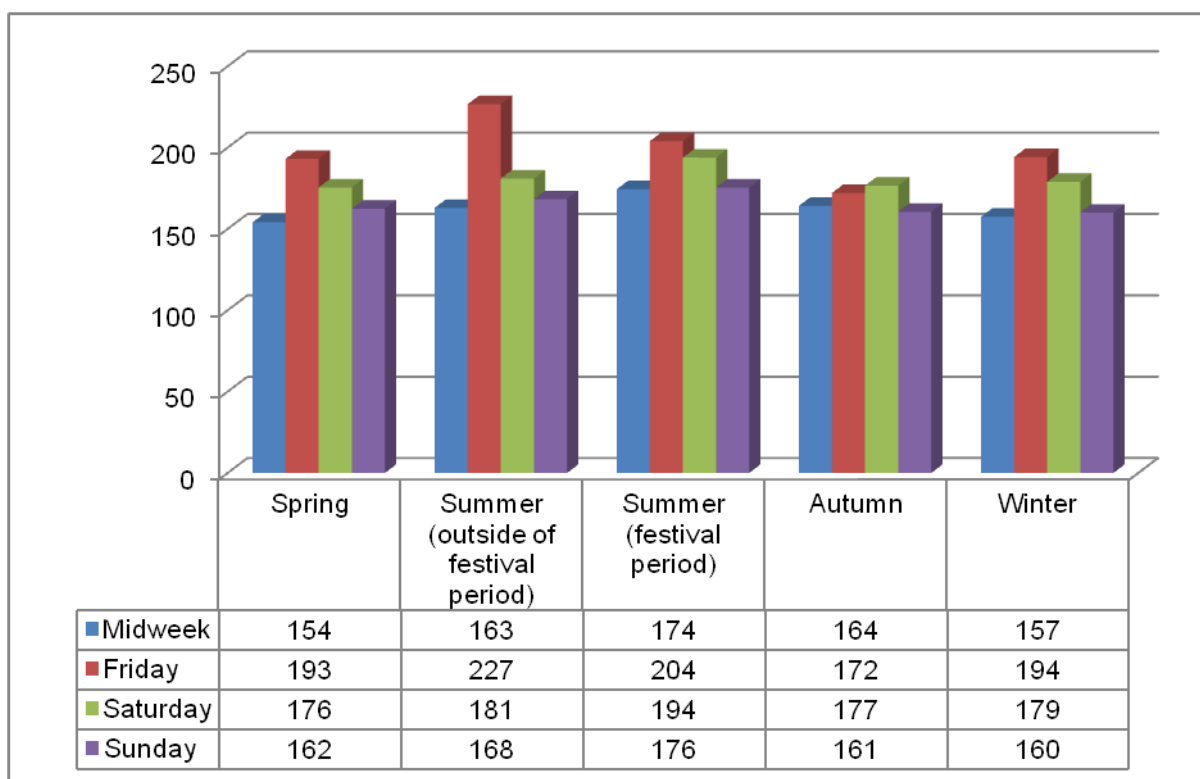
⁷¹ Only 13 out of the enumerated venues host DJs at all.

Across all venues, the average number of gigs per week is 3 (including DJs and free events. Many venues have significantly fewer than this, but – equally – some city centre venues have live music of some description every night, or nearly every night)

The total number of venues with 2 or more nights of live music per week is 94⁷².

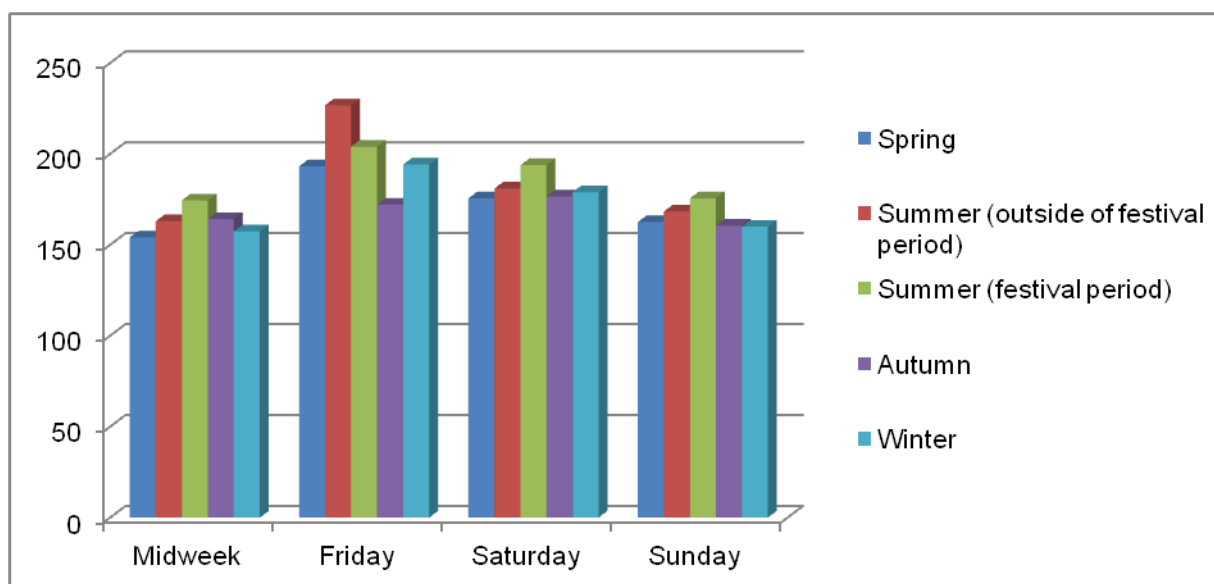
Annual live music activity

Venues were asked to estimate the size of their average crowd in Spring, Summer (during festival period), Summer (outside festival period), Autumn, and Winter, and also to estimate their average crowd on different days of the week. As can be seen, Summer during festival period is generally the busiest time of the year and Fridays are the busiest day/night.⁷³ The average audience for live music across the year is 177.



⁷² This figure is drawn from online survey responses, enumerated surveys and analysis of listings, venue websites and venues' social media presence.

⁷³ NB Edinburgh Zoo Fridays in June with 2,500 capacity are the cause of the significant spike in the data.



SECTION 3E: Economic value of live music and local employment

Economic value of live music

We estimate that on Saturday 6th June there were approximately **11,500 people** attending live music events in Edinburgh. At £15 per head per gig (£93.30 monthly total divided by 6.3 gigs per month – see p. 67), we estimate that approximately **£170,000** was spent on live music on the night of the Census (approximately £90,000 on ticket sales alone).⁷⁴

Annually, we estimate that the annual total attendance of live music events in Edinburgh is around **2.7 million people**. At £15 per head, the total estimate of spend on live music in Edinburgh per year (incl. tickets, food/drink, and travel) is at least **£40 million**.⁷⁵ NB this is very much an

⁷⁴ This figure is based on 58 enumerated or staff-estimated attendance figures from venues on the night of the Census. Estimates for the remaining venues which were hosting live music on Saturday 6th June have been calculated by working out the average of the percentages that venues were full on Census night, i.e. number of people on Sat 6 Jun divided by total capacity of each venue. The average across all the remaining venues for which we have these two data is 57%, and the estimate for each venue's attendance on Census night is the venue's total capacity multiplied by 57%. NB for Festival Theatre and Edinburgh Playhouse, the estimated attendances were taken by dividing attendance figures by number of individual performances and screenings (Biggar Economics (2014), *Edinburgh's Cultural Venues Impact 2013-14: Technical Appendix*, p.11)

⁷⁵ This total is based on the following calculation: using data from the online venue survey, we calculated ratios between Saturday in Summer outside of festivals and the other 19 timepoints (midweek, Friday, Saturday, and Sunday in Spring, Summer (in festival period), Summer (outside festival period), Autumn, and Winter). We used these ratios multiplied by the total attendance on Saturday 6th June to work out estimates for the total attendance each week for the 20 timepoints, multiplying the midweek figure by 2 to take account of the fact that Mondays and Tuesdays are often quiet and/or live music-free. We followed the Victorian Census model and allowed for the fact that venues have the occasional 'dark' night and that there is a seasonal variation in audience/gig numbers, and so have calculated the number of weeks in each quarter based on a 50-week 'year' in order to allow for that variation. The estimated grand total attendance figure was calculated by multiplying these weekly figures by the number of weeks in each time period (12.5 weeks for Spring, Autumn and Winter, and 6.25 weeks each for the two Summer periods, again erring on the conservative side).

illustrative rather than a definitive figure – the actual value of live music in Edinburgh or any city would be very difficult, if not impossible, to obtain.

NB This is a deliberately conservative estimate, particularly as the total doesn't take into account the increased spend over the festival because it is based on the average spend of £15 per gig of an audience predominantly based in Edinburgh (84%) and therefore does not take into account the increased accommodation and travel costs during the festival period.

There are an estimated 23,000+ live music events in Edinburgh annually, not including the festivals.

Entry price

19% of venues were charging a door fee on Saturday 6th June (based on the 86 venues from The List, The Skinny, the Gig Guide and 7 Ahead, plus the extra venues visited by our researchers but also verified from the 54 enumerated venues on or after Census night for which we have information about a door charge).

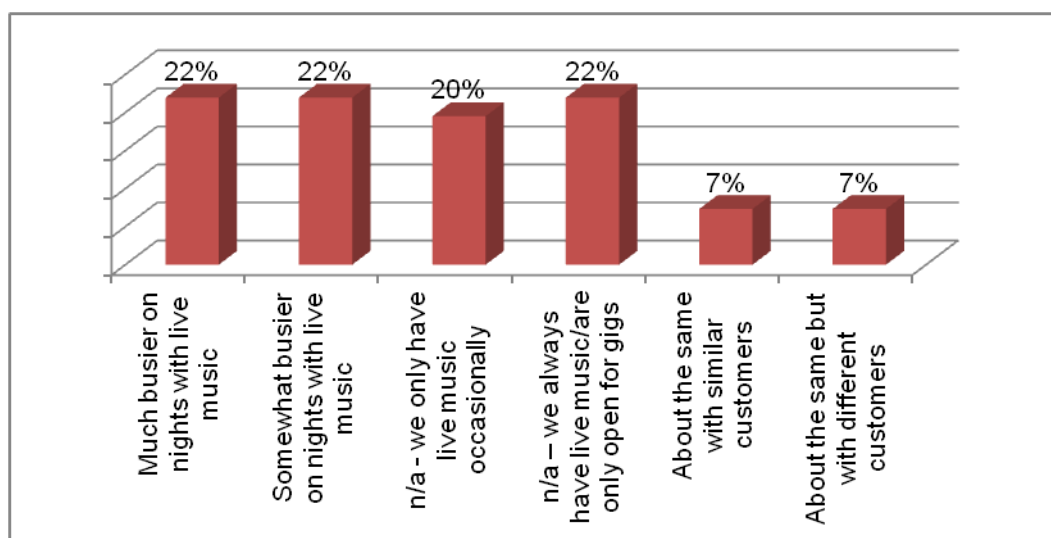
Across Edinburgh, the average door price for those charging entry on Saturday 6th June was **£10**.

On average, 50% of live music events have a door charge – 20% of the 41 venues which took part in the online census charge for entry 100% of the time.

If there is a door charge, the *average* ticket price is £10 midweek, £18 on a Friday/Saturday, and £6 on a Sunday (from total 17 responses to the online census for this question).

Impact of live music on trade and alcohol sales

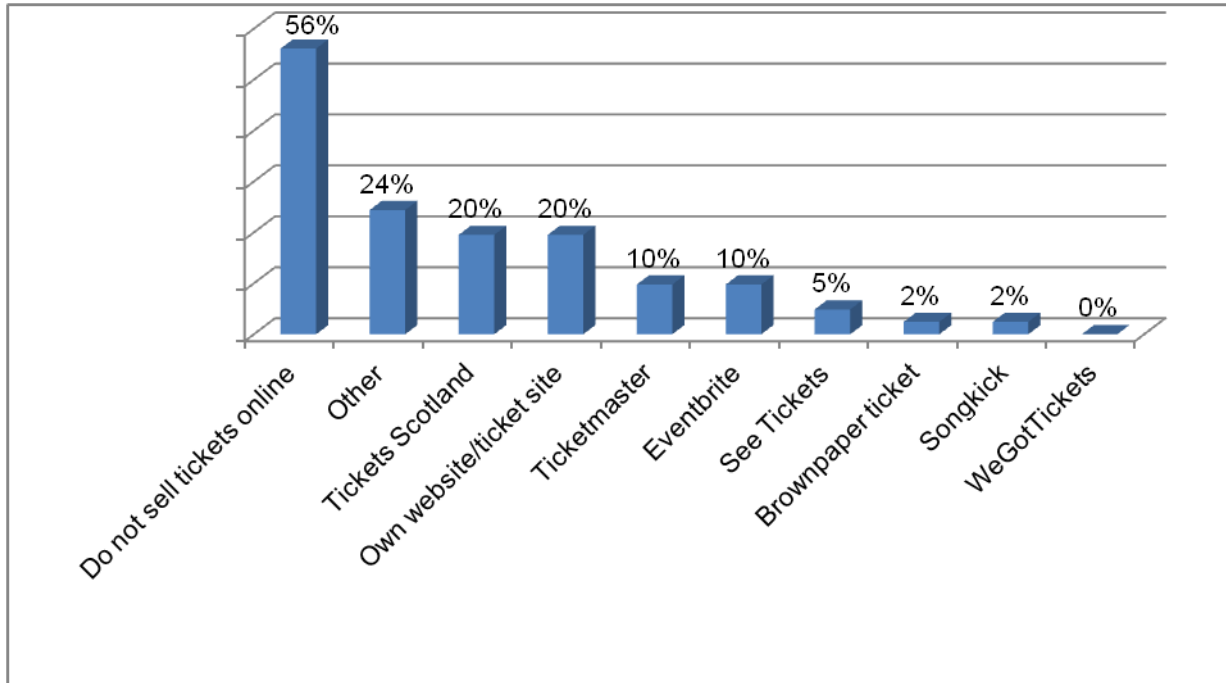
Venues were asked whether they noticed a significant increase in trade on nights with live music compared to the same night of the week without live music. Most responded that it was either much busier (22%) or somewhat busier on nights with live music (22%). For some, the question was irrelevant as they do not open unless there is music on. No venues responded that they are slightly or much less busy on nights with live music.



49% of venues responded that they have more alcohol sales when live music is on; 20% responded that alcohol sales were about the same when. The question was irrelevant for 32% of the venues: they are either only open for gigs (20%) or do not sell alcohol (12%).

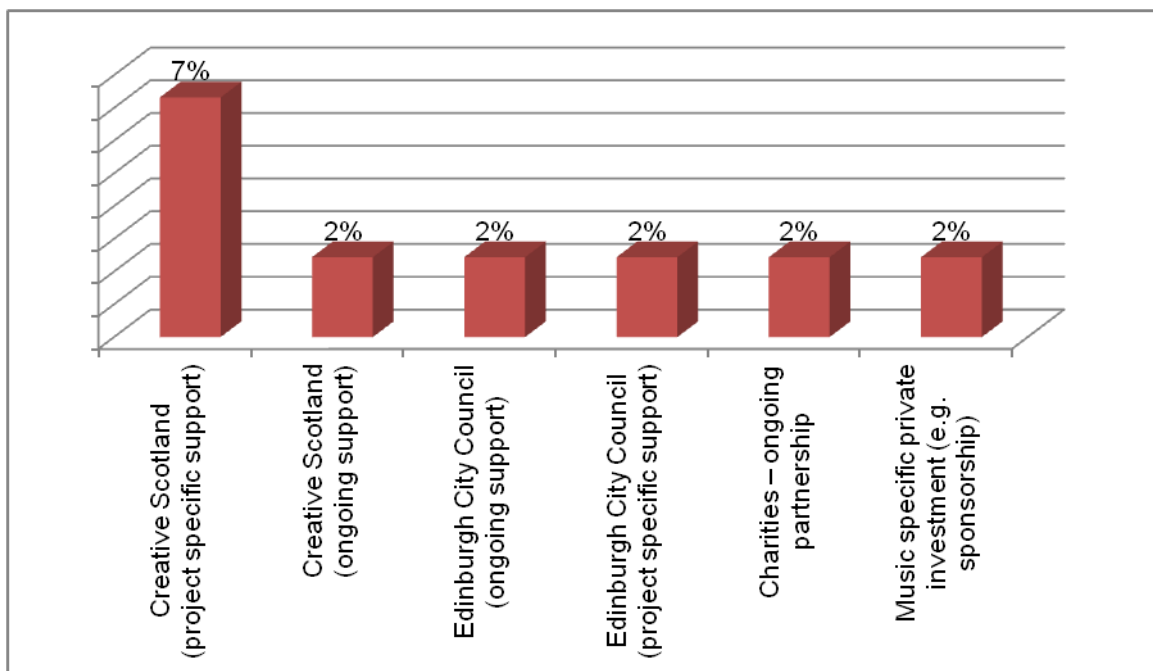
Ticket selling

The majority of the 41 venues in the online survey do not sell tickets online (56%). One respondent answered that every external promoter used a different outlet, i.e. that it depends on the event. Vendors in the 'Other' category included Ticketweb, Ripping Records, Skiddle, and Ticketscript.



Funding

Out of the 41 venues which took part in the online survey, 78% have not received any external funding for their venue or its live music related activities.



SECTION 3F: Employment

Staff employment on Census night

We obtained headcounts of musicians and DJs for (a maximum of) 46 venues on Census night, totalling **141 musicians** and **13 DJs** playing on the night of the Census. Assuming that all of these musicians were being paid and were being paid at an average of £92 per gig (see musician survey on p. 83), we estimate that this totals approximately **£14,150** paid to musicians and DJs on the night of the Census at the 46 venues for which we have data. Annually, we estimate that for these 46 venues, musicians and DJs are paid approximately **£2.9 million per year**.⁷⁶

Out of the 58 enumerated venues, we obtained headcounts of staff for (a maximum of 45), totalling:-

214 bar staff / Front of House were working on Saturday 6th June (from 45 venues).

58 door staff / security were working on Saturday 6th June (from 32 venues).

8 box office staff were working on Saturday 6th June (from 24 venues).

55 kitchen staff were working on Saturday 6th June (from 27 venues).

5 production staff were working on Saturday 6th June (from 23 venues).

In total, we estimate that there were **335** venue staff in total working on Saturday 6th June from the (max) 45 venues for which we have data.

At minimum wage of £6.50 per hour for an average 6 hour shift, we estimate that at least **£13,000** was spent on non-music staff in the 45 venues on one night.

Annually, at minimum wage of £6.50 per hour for an average 6 hour shift, based on 4 gigs per year over 50 weeks, we estimate that venue and production staff are paid approximately **at least £2.6 million per year** when live music events are on in a venue.

Basing full-time employment on a 35 hour week for Full Time Equivalent employment (FTE), and assuming – based on the model employed in the Victorian Census (p. 4) – that a gig equates to a minimum 4 hours for performers and 6 hours for production and venue staff, for the 45 venues, these figures equate to:-

18 FTE jobs for musicians and DJs

1 FTE production staff

57 FTE venue staff (bar, FOH, security, box office).

NB This number is only for the 45 venues for which we have headcount data for staff – *the actual total across Edinburgh is likely to be much higher.*

It should also be noted that the majority of the venues for which we have headcount data were pubs, wherein musicians and/or members of bar staff would most likely have undertaken all production duties. Including year round activity (to say nothing of the festival period) would give a much larger figure for the number of people employed at venues providing music in the city.

⁷⁶ This figure is based on musicians playing 4 gigs a week, 50 weeks of the year. NB these are most likely not to be the same musicians each night!

Another way of approaching this would be to extrapolate from figures below from our online survey (a cross section of small to medium venue types) suggests that the *average* venue employs 4.3 staff midweek, 6.1 on Friday, 5.4 on Saturday and 4.3 on Sunday. We therefore estimate that there are at least 1,200 non-musician staff shifts each week in venues with music and over 75,000 shifts per year. Based on a 6 hour shift at minimum wage (£6.50 at time of publication), this yields a figure of at least £3 million paid to staff in wages at venues with music and approximately 259 FTE jobs in this subset of venues alone.⁷⁷

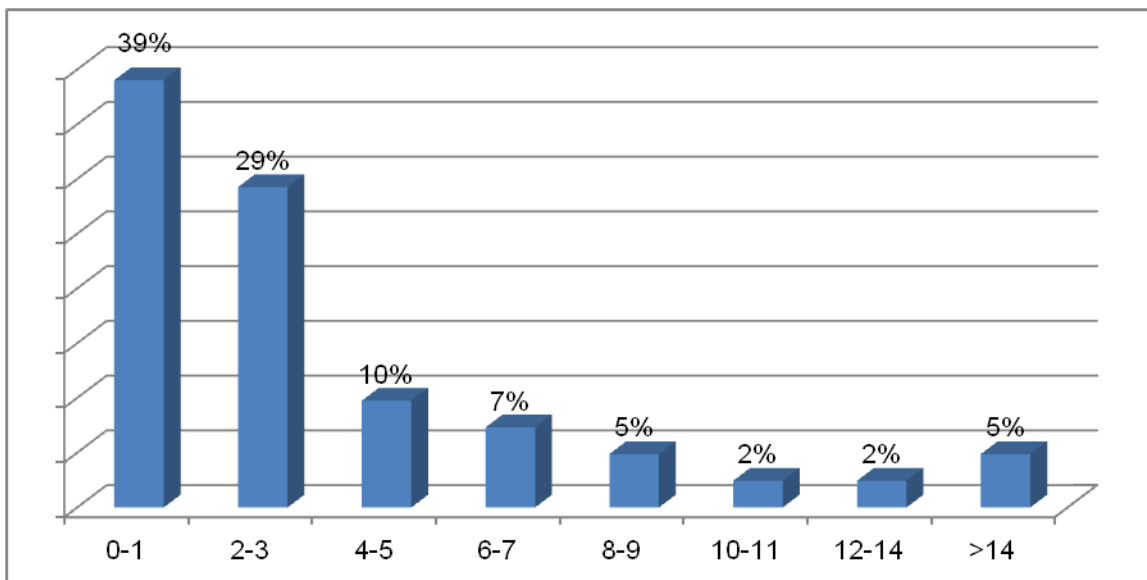
These figures should be approached with caution since we do not have detailed figures of the hours worked or shift patterns of staff and, obviously, these will vary considerably across the venues. Again, the figure is indicative rather than definitive.

Staff employment throughout the week

From the 41 venues which took part in the online survey, the day/night of the week for which venues employ the most staff is Friday.

Midweek

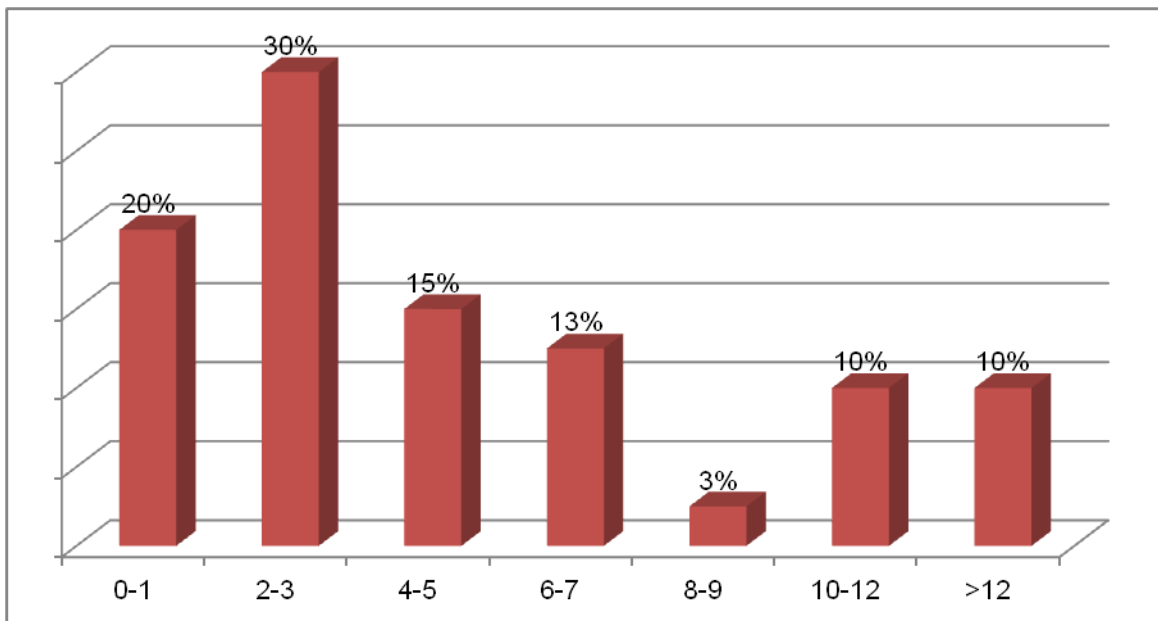
The average number of staff employed midweek is 4 (4.3).



⁷⁷ These figures were obtained using a multiplier which compares Saturday night to the other nights of the week – as per the model used to calculate the economic value of live music in Edinburgh, we have conservatively taken midweek as being two nights and used 50 weeks in the year.

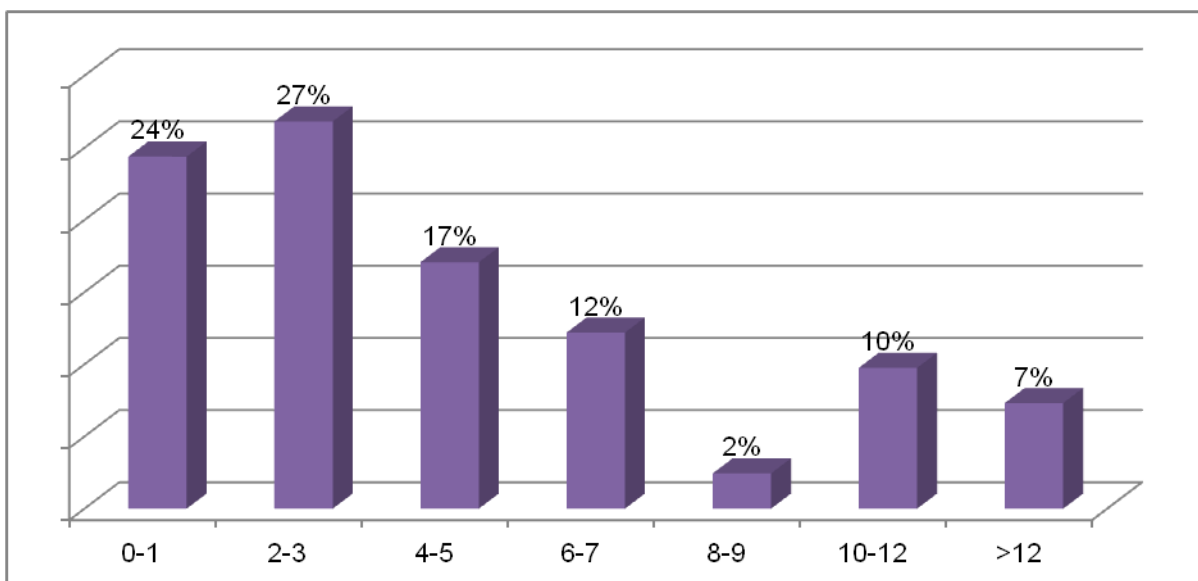
Friday

The average number of staff employed on a Friday is 6 (6.1).



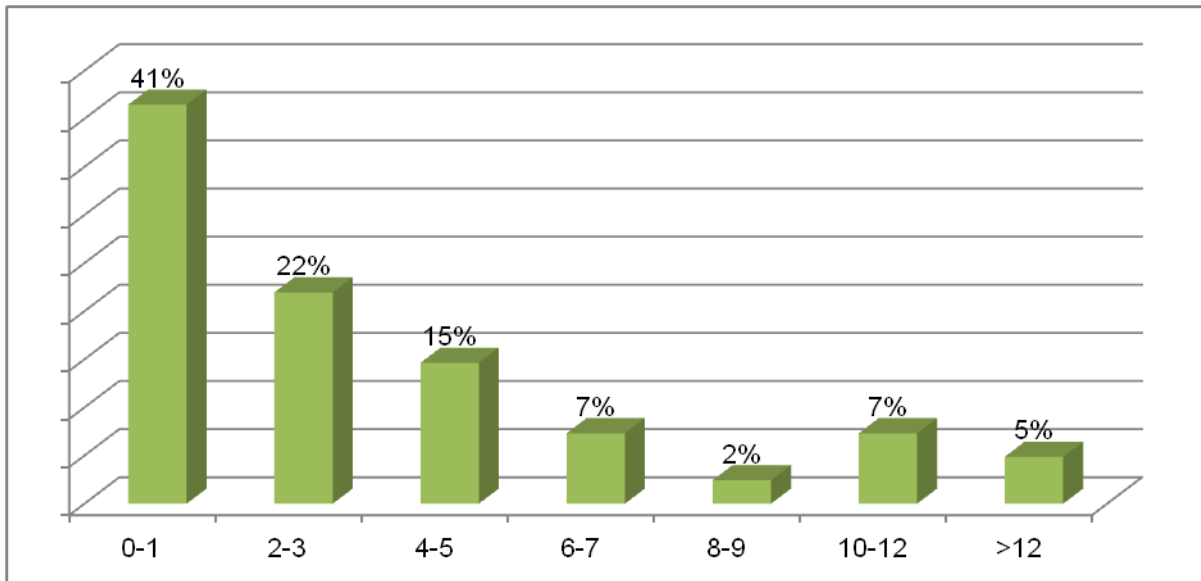
Saturday

The average number of staff employed on a Saturday is 5 (5.4).



Sunday

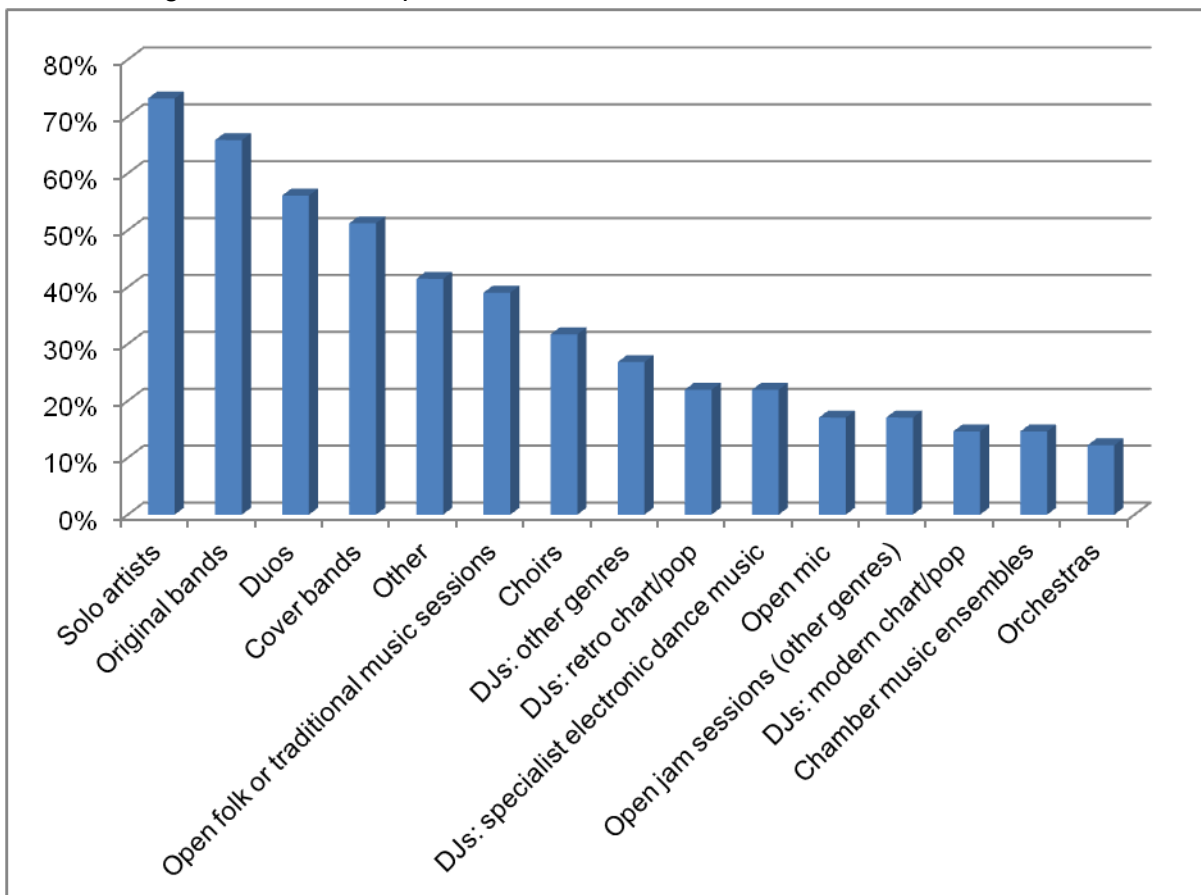
The average number of staff employed on a Saturday is 4 (4.3).



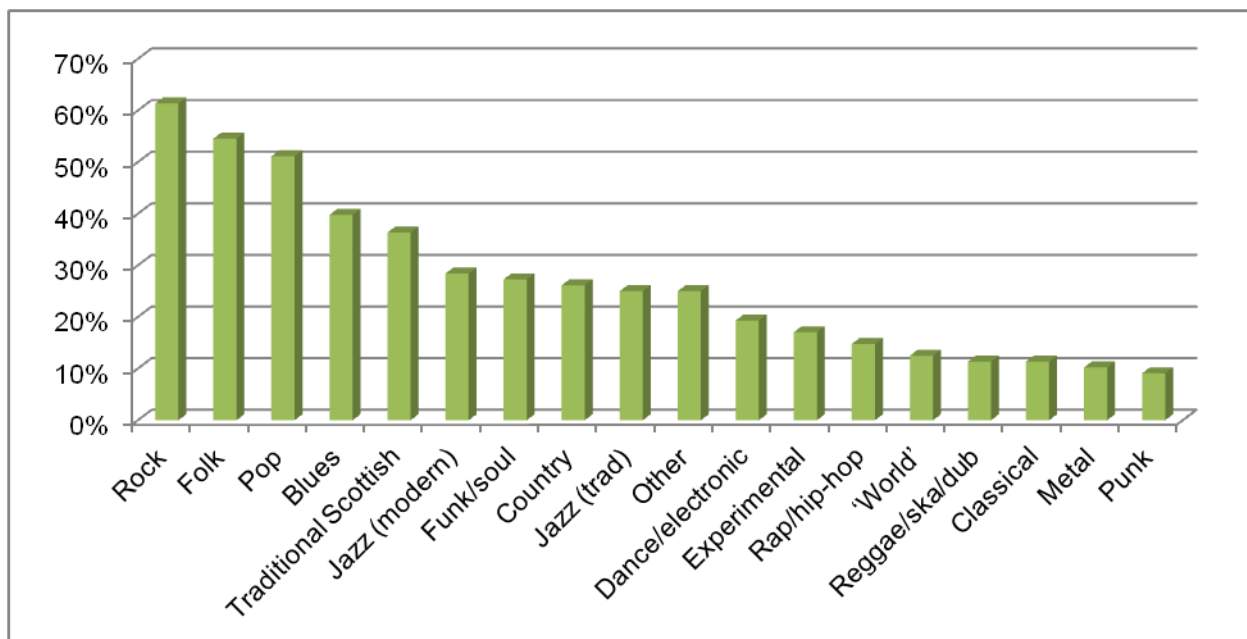
SECTION 3G: Performers and genre

Types of live music performers

The most regularly featured types of live music performers are solo artists (73%), original bands (66%), duos (56%) and cover bands (51%). The 'Other' category in this instance includes 'big bands', 'bluegrass', 'theatre', 'opera', and 'drama'.



Kinds of music regularly featured



The most regularly featured kinds of music in the 88 venues for which we have data are rock (61%), folk (55%), pop (51%), and blues (40%). The self-identified 'Other' category in this instance includes acoustic/singer-songwriter/open mic, easy-listening, chart, indie, Irish, and covers.

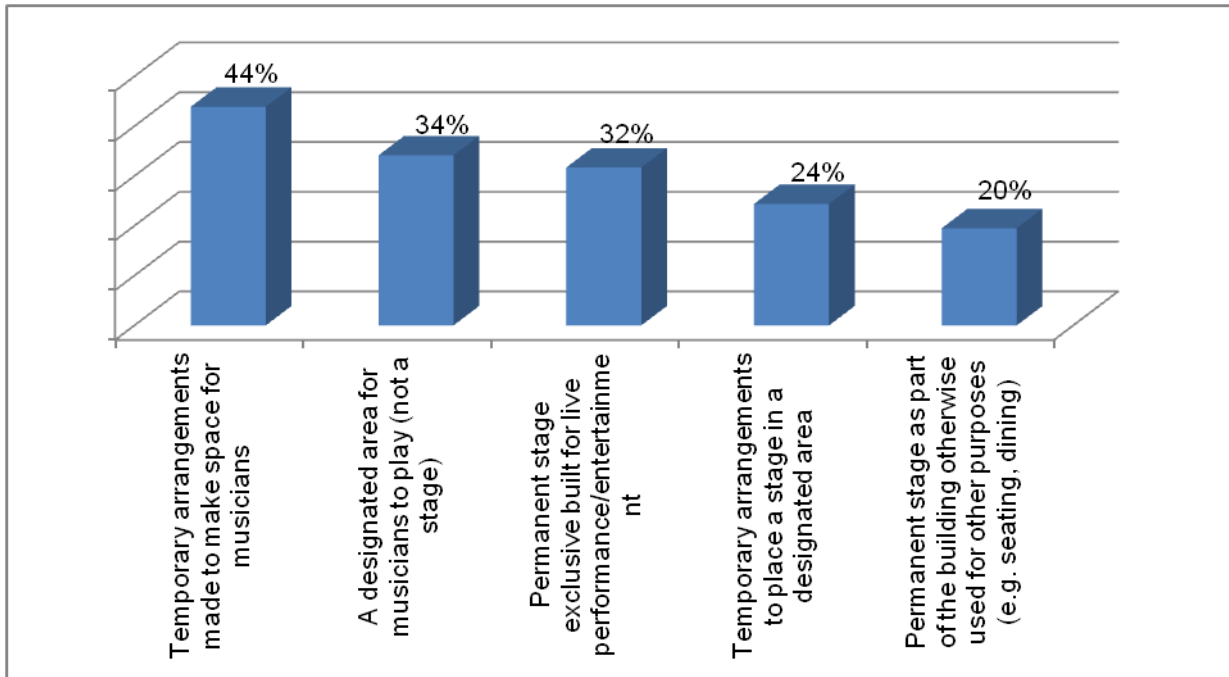
It is interesting to compare the genres most frequently featured in venues against those preferred by audiences (Rock, Folk, Jazz (modern), Pop, Blues, Dance/electronic – p. 69) and those performed most regularly by musicians (Rock, Folk, Pop, Traditional Scottish/Irish, Experimental, Classical – p. 77).

In Edinburgh at least, rock, folk, and pop appear to be the most dominant forms of live music. Again, it should be noted that genre boundaries are difficult to ascribe with precision and open to a large degree of interpretation.

SECTION 3H: In-house facilities

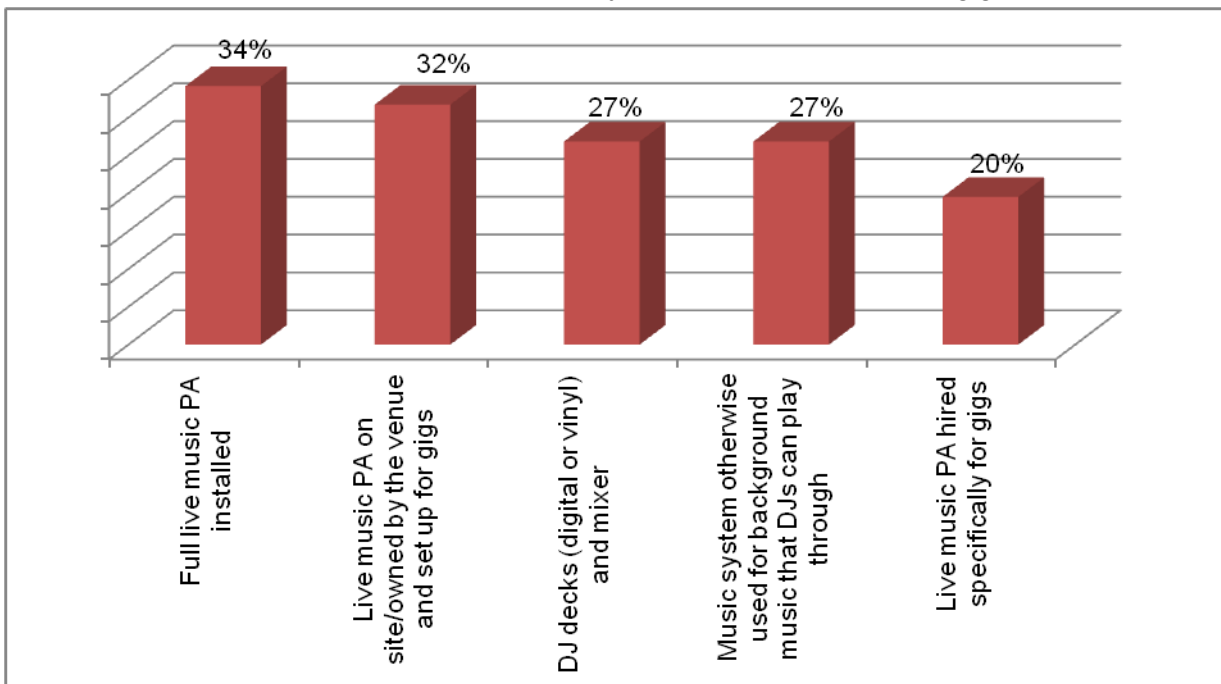
Staging for live music

Most venues do not have a permanent stage for live music but instead have temporary arrangements (44%) or a designated space for musicians to play (34%). Unsurprisingly, the type of venues most likely to have a permanent stage is music venues for whom live music is of primary significance.



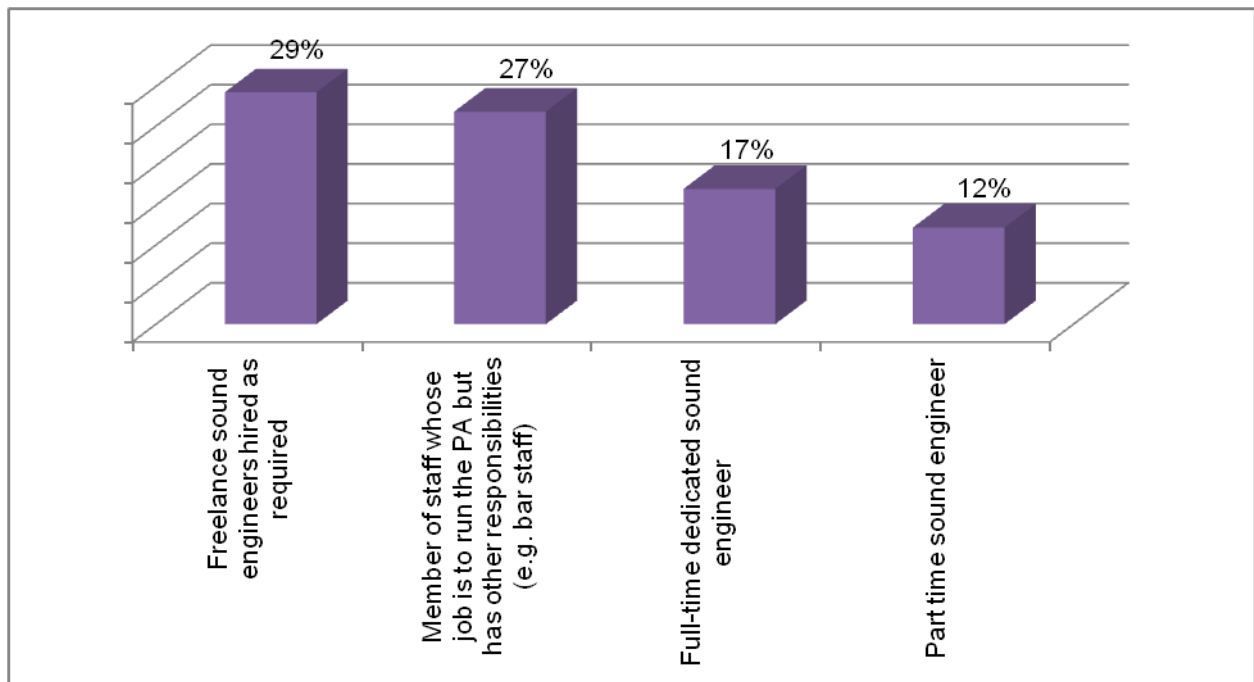
Amplification equipment

According to the enumerated Census data, 66% of venues have some form of in-house PA system (from 59 venues). From the online survey of 41 venues, 34% have a full live music PA installed and 32% have a live music PA on site/owned by the venue and set up for gigs.



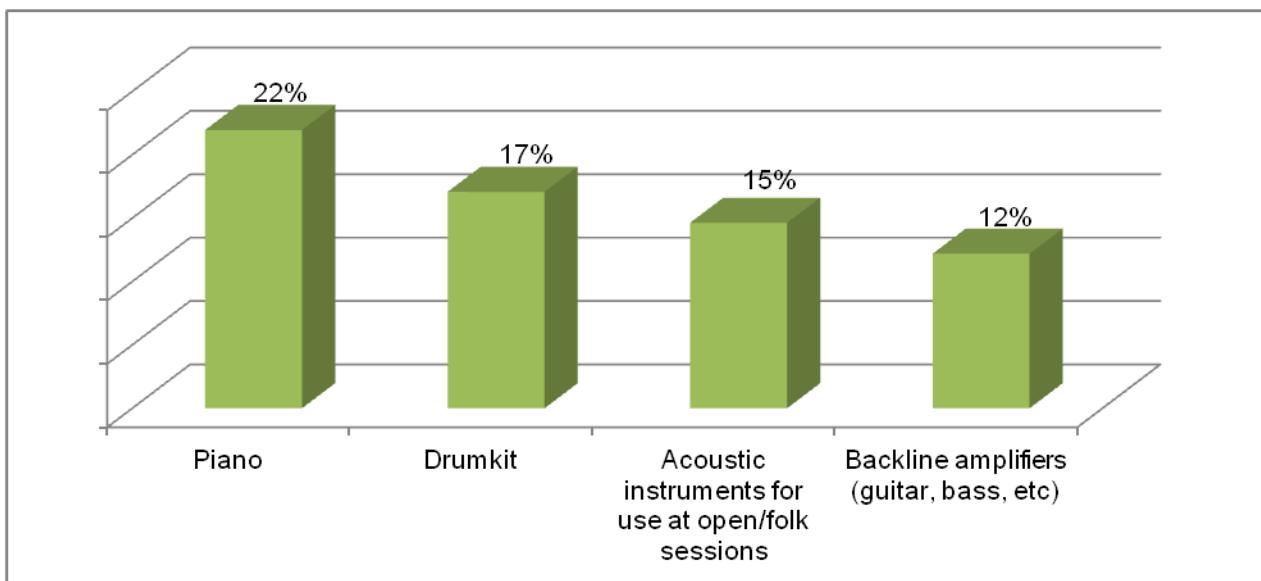
Sound engineers

If venues use a sound engineer, it is more likely that they will be freelancer, hired when required (29%), or will be a member of staff who has other duties (e.g. bar staff – 27%), than that they will be fully or semi-employed by the venue.



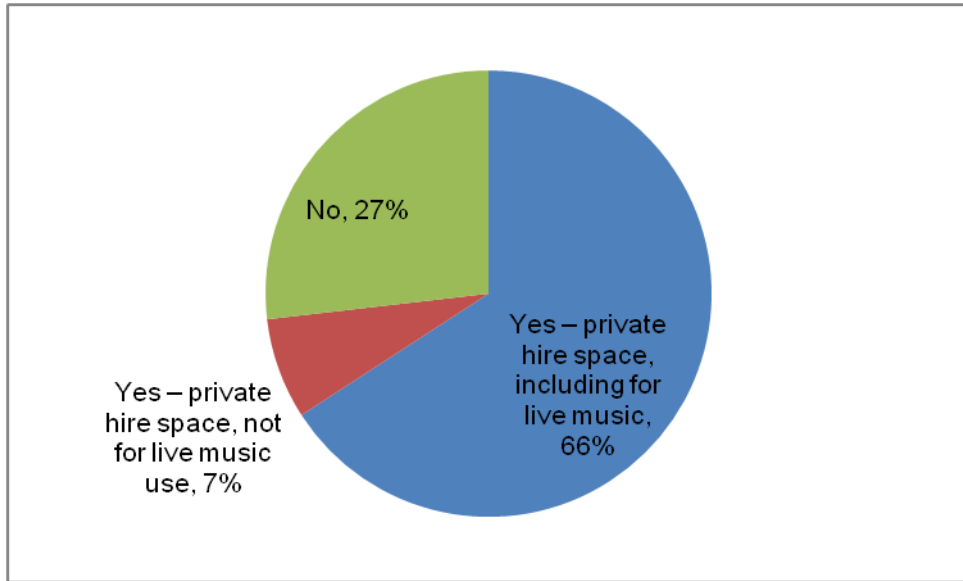
Musical equipment

If a venue has musical equipment for use by musicians, it is most likely to be a piano (22%) and least likely to be backline amplifiers (12%). Again unsurprisingly, the most likely venues to have a backline are music venues for whom live music is of primary significance. Pianos are most likely to be found in churches, concert halls, music venues, pub/bars, and theatres, and drumkits in music venues, nightclubs, and pub/bars.



Private space for hire

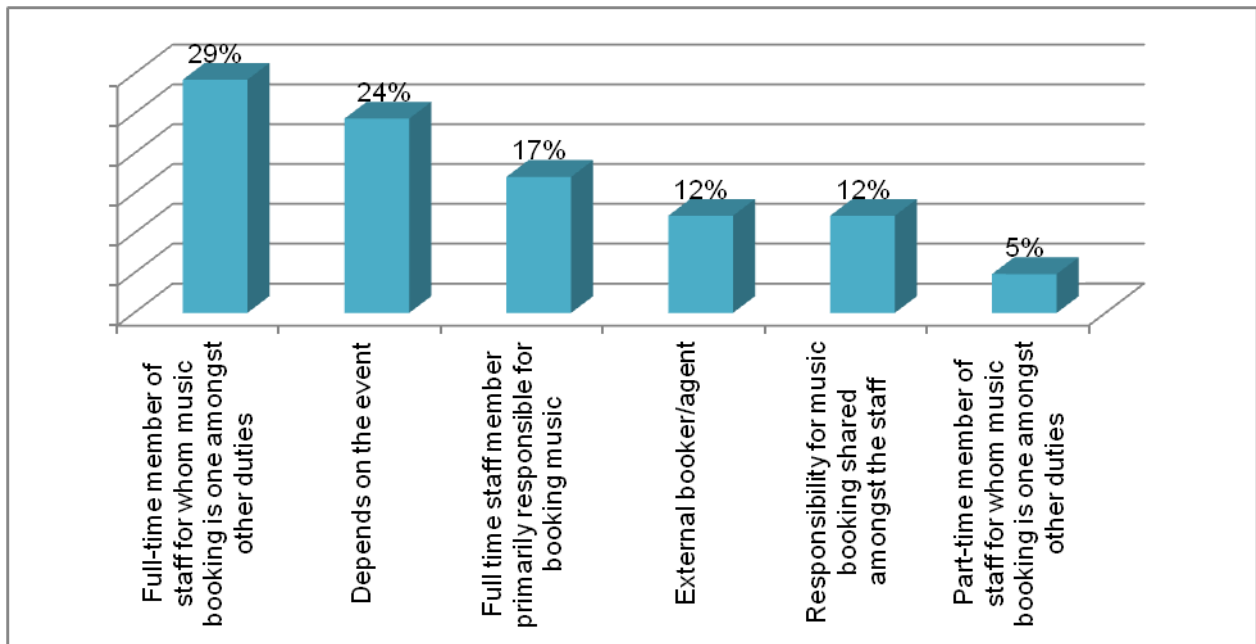
66% of venues have a private hire space which can be hired for live music – the hire cost will be c. £126 (average from 7 venues).



SECTION 3I: Booking and promotion practices

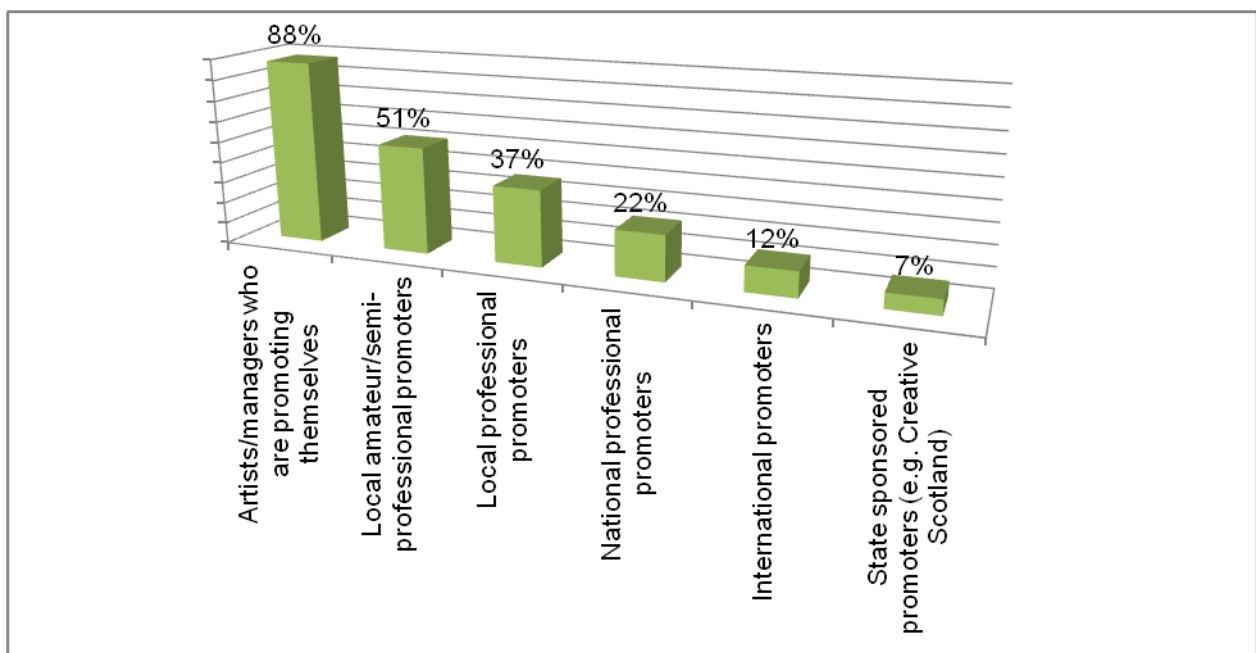
Internal bookings

There do not appear to be any hard and fast rules about how venues book artists. For most venues, live music booking is just one of many duties for a full-time member of staff (29%); for others it depends on the event (24%). The more significant live music is to its business model, the more likely the venue will have a full time member of staff primarily responsible for booking live music and/or to use an external booker or agent, Venues for which live music is a partial element of its main business are more likely for music to be booked by a full-time member of staff for whom live music is just one of many responsibilities.



Working with external promoters

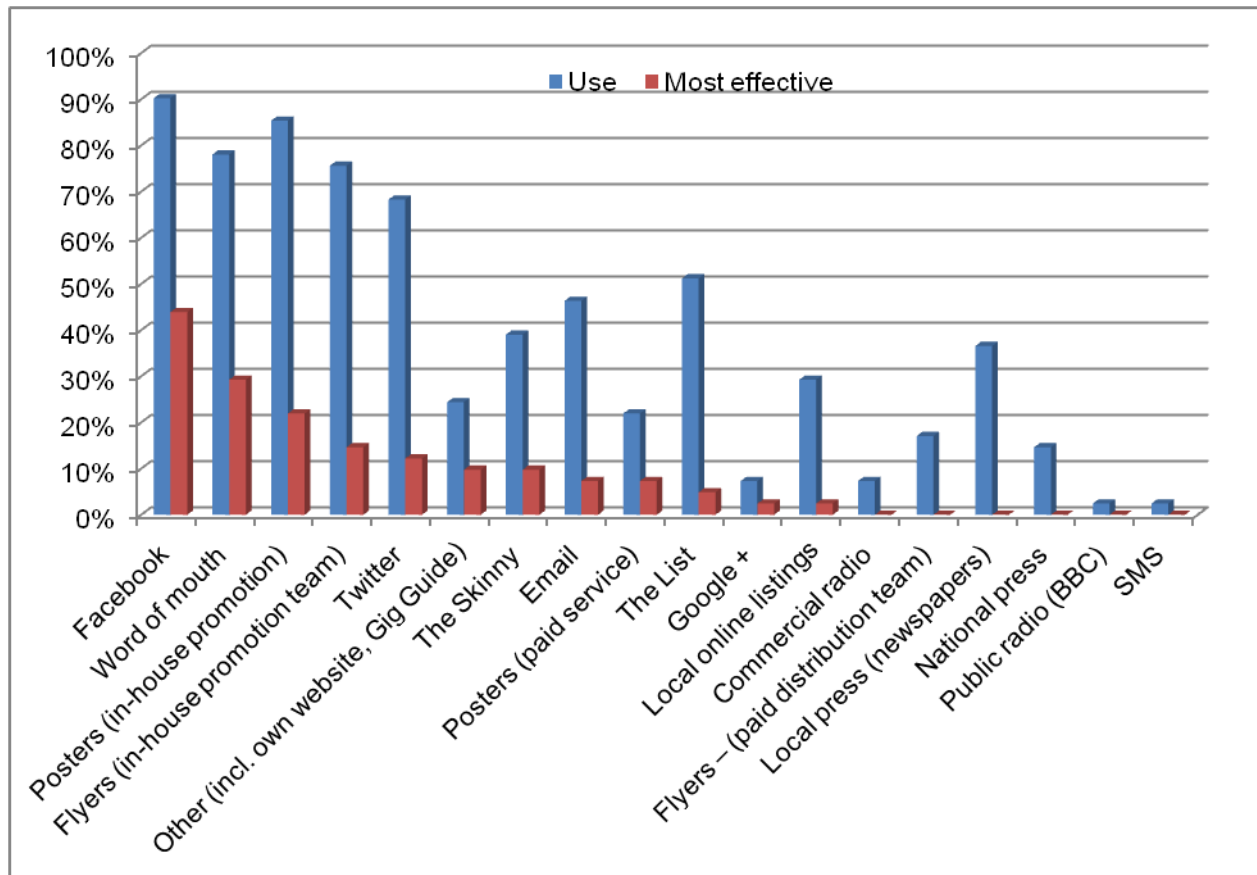
When venues work with external promoters, as opposed to booking artists themselves, they are most likely to work with artists/managers who are promoting themselves (88%).



Promoting live music

The chart below shows the methods of promotion used by venues measured against what they find the most effective.⁷⁸

As with the audience survey on p. 63 and the musician survey on p. 85, Facebook and word of mouth are the most used, and considered to be the most effective, forms of promotion.



⁷⁸ NB respondents to the online survey were allowed to tick as many as appropriate when asked which methods of promotion they regularly used but were asked to choose the two most effective from the list.

SECTION 3J: Regulatory issues

Venues are about as likely as not to have been affected by noise, planning or development issues (48%).⁷⁹

The following data is drawn from the online survey.⁸⁰ No venues reported experiencing any health and safety issues.

Noise issues

Within the World Heritage Area, 39% of venues are experiencing noise issues compared to 46% outside of the area.

	No noise issues	Noise issues
World Heritage Area	61%	39%
Not World Heritage	54%	46%
Grand Total	58%	42%

For the majority of venues outside the World Heritage Area, noise issues have stayed the same over the past 12 months or slightly increased. Within the World Heritage Area, noise issues have stayed the same or decreased.

	Increased	Stayed the same	Decreased
Not World Heritage	17%	75%	8%
World Heritage Area	5%	70%	25%
Grand Total	9%	72%	19%

From the online survey, 42% of venues have had noise issues or restrictions that relate specifically to live music.

It is important to note here that this does not refer exclusively to noise issues that have involved council officers or police but the whole spectrum of problems relating to sound leakage.

Data supplied by the City of Edinburgh Council for the period 1st April 2014 to 30th June 2015 indicates that of the total entertainment noise complaints it about licensed premises (213) 64⁸¹ related to live music but these pertained to 18 venues in total. Whilst mediation was carried out in 14 cases, with level sets (noise limiters) imposed in 4 cases, none of them reached the licensing board.

Therefore, venues reporting 'noise issues' in our survey include those that have been resolved without 'official' involvement. This is borne out by the fact that whilst 42% of venues reported 'noise issues', only 15% reported 'licensing issues' which may not have been related to noise.

⁷⁹ This figure is based on responses from 52 enumerated venues for which we have data on the question: 'Have you been affected by noise, planning or development issues?'

⁸⁰ These figures are based on data from the 36 venues which responded to this question in the online survey only: 'Are you *currently* [author's italics] affected by any of the following?' Of these 36, 23 are in the World Heritage Area while 13 are without.

⁸¹ 49 of these 64 instances were witnessed by council officers.

In conjunction with the fact that 44% of musicians (see p. 87) indicated that their gigs had been affected by noise restrictions, this indicates that a relatively high level of self-policing is taking place amongst venue operators. This is supported by the responses from venues below, of which some describe venues reaching an accommodation with neighbours and imposing their own live music curfews.

However, this self-policing and the frequency with which the 'inaudibility clause' crops up in the qualitative comments suggests that it is having a 'chilling effect' on venues' preparedness to put on live music and the kind of music they will provide. This is especially so given that they will be naturally protective of their licences and sensitive to the potential for any involvement from council officers or police.

When asked for details regarding noise issues, responses were as follows:-

- We aren't allowed to play above a certain noise level. We wouldn't for eg have a full band with drums etc
- 10 years ago. We amended to entrance and problem solved.
- We are restricted to a 1am finish for the club on the advice of The Police.
- After a complaint from a neighbour which went to the licensing board it was concluded that we held live acoustic music to finish at a reasonable time of 11pm
- Residential area, flats right about venue, complaints dependent on types of music. however a good relationship has been established and we work together
- Not in the last 12 months
- Not specifically for our venue, but a general clause in the term of the licence. We do not have loud rock bands and do not expect folk to play after 10pm so there is not an issue
- Not allowed live music upstairs and many other restrictions
- Non-amplified live performances only. 11pm curfew for live music.
- Issue is sole complainer and resulted in visits from LSO's - tried to mediate with complainer but to no avail.
- We've had issues in the past but have improved our sound proofing, and have a self-imposed live music curfew of 11pm.
- Live music curfew at 10pm for neighbours due to conditions on licence
- All issues regarding live music have been resolved with our neighbours and patrons.
- One neighbour who lives next to venue gets noise disturbance. He is now cooperating with discussions but wants inaudibility which we can't achieve without significant structural change which doesn't guarantee effectiveness. It is ongoing and very difficult to resolve.
- Trucks loading late at night and trucks arriving overnight. We asked touring co's not to arrive before 7am
- We've spoke with the neighbours. Timed live music differently. Reduced the volume.
- Noise complaints from hotels. We sat down with council and policy and hotel managers and 'had it out'. Result was agreement to do what we could be a good neighbour - i.e.: closing doors and windows, turning bass down, etc

Licensing issues

Within the World Heritage Area, 9% of venues are experiencing licensing issues compared to 27% outside of the Area.

	No licensing issues	Licensing issues
World Heritage Area	91%	9%
Not World Heritage	73%	27%
Grand Total	85%	15%

For the majority of venues within and without the World Heritage Area, licensing issues have stayed the same over the past 12 months or slightly increased.

	Increased	Stayed the same	Decreased
Not World Heritage	10%	90%	0%
World Heritage Area	6%	89%	6%
Grand Total	7%	89%	4%

Planning issues

Within the World Heritage Area, 14% of venues are experiencing planning issues compared to 0% outside of the Area.

	No planning issues	Planning issues
World Heritage Area	86%	14%
Not World Heritage	100%	0%
Grand Total	91%	9%

For the majority of venues within and without the World Heritage Area, planning issues have generally stayed the same over the past 12 months.

	Increased	Stayed the same	Decreased
Not World Heritage	0%	100%	0%
World Heritage Area	6%	83%	11%
Grand Total	4%	89%	7%

Building/development issues

Within the World Heritage Area, 21% of venues are experiencing building/development issues compared to 9% outside of the Area.

	No building/development issues	Building/development issues
World Heritage Area	79%	21%
Not World Heritage	91%	9%
Grand Total	83%	17%

For the majority of venues within and without the World Heritage Area, building/development issues have stayed the same over the past 12 months. Note the 11% increase in building/development issues outside the World Heritage Area, however.

	Increased	Stayed the same	Decreased
Not World Heritage	11%	89%	0%
World Heritage Area	5%	90%	5%
Grand Total	7%	90%	3%

Parking/loading issues

Within the World Heritage Area, 39% of venues are experiencing parking/loading issues compared to 25% outside of the Area.

	No parking/loading issues	Parking/loading issues
World Heritage Area	61%	39%
Not World Heritage	75%	25%
Grand Total	66%	34%

For the majority of venues within and without the World Heritage Area, parking/loading issues have stayed the same over the past 12 months. Note the 11% increase in parking/loading issues in the World Heritage Area, however.

	Increased	Stayed the same	Decreased
Not World Heritage	0%	100%	0%
World Heritage Area	11%	84%	5%
Grand Total	7%	90%	3%

Qualitative comments on regulatory issues

Get the occasional traffic warden and obviously it's not an ideal spot for loading/unloading but no real issues more than one would expect given the location. 2 or 3 years ago - a bit of a noise complaint from someone but not sustained (closed the doors) and no real LSO grief.

We are based in George Street! All the parking spaces get taken very quickly and we have no dedicated parking in or around the building.

The Council has reorganised Market street and ignored our request for parking nearby for loading and unloading. They also now charge for parking exemption passes. For the first time!

Parking is too restrictive

Vehicle access is restricted at certain sites.

The parking in George Street has been increasingly difficult for patrons

Residential accommodation above bar restricts our options.

We are fundraising to improve the building and facilities

Our friend the inaudibility clause

No issues of late. Our neighbours are used to the live music and it never plays later than 11pm.

SECTION 3K: Qualitative data on what the government (local, Scottish and/or UK) could do to improve the live music scene

The question asked in the online venue survey was 'What could the government (local, Scottish and/or UK) do to improve the live music scene?' The qualitative feedback shown here includes all the responses to this question from venues which took part in the online survey – they have been loosely grouped under broad headings but some fit under more than one category.

Protect live music from development

The local authority could support live music by restricting private developers buying up all of the spaces in the city. Live music is not valued in policy or practice. Music causes far fewer noise or anti-social behaviour issues than the cheap / low rent drinking establishments the council planning department seems to favour. Live music contributes to the local economy as well as our cultural life. What the city lacks is mid-sized venues programming affordable events for local people.

Regard venue interests/requirements as equal to that of incoming/existing tenants/homeowners and arbitrate between the needs and desires of both to find solutions, as opposed to always favouring those who choose to live next to venues with live music/in areas that have nightlife!!!

Reduce restrictions on venues where residential property has been built too close to existing venues without appropriate noise barriers (e.g. professional insulation)

improve licensing to encourage promoters/venues, not immediately see the sound of music as a nuisance, introduce protection for live music venues, agent of change, financial and other enhanced forms support for live music venues

Arbitrate disputes/complaints. Remove zero audibility clause. Sussidise/ support larger venues. Protect venues from closure.

Noise, licensing and other issues

They could support venues rather than acting on single complaints

Simplify (exempt) charities from entertainment licences and interval alcohol licences for occasional events.

The inaudibility clause needs to be struck from legislation. Edinburgu Council should take a positive role in encouraging live music provision and attendance in the city.

Reforming noise complaint-related laws. Positive support for local grassroots music, year-round. Actively protecting local music venues.

Remove the licensing clause which a neighbour must not hear audible music. This is outdated and simply restrictive. It is weighted heavily against a reasonable or logical music/licence policy.

Remove the law that allows one person to dictate what music is played, it is unacceptable at all levels that one can spoil it for many.

Show more flexibility to live music. It seems to take only one or two complaints and/or bad media press and the venue is faced with possible license restrictions or possible closure.

- Work with venues, not against them - Appreciate live music attracts tourists and business - get rid of 'sole complainer clause- it's a city centre!

Funding

"Get behind it a bit more" Funding "Years ago I helped a record label out and they got Arts Council money. You don't see so much Arts Council promotion"

God big subject. Theatre, classical music, ballet, opera pipe bands even Christmas has help. I believe live modern music is the only non assisted arts event in Edinburgh.

Help fund it and have more music education and support the venues

Value live music

Understand the importance of live music for musicians performers, new comers, visitors from overseas. Importance not only to the specific venue but to the city and national existing worldwide reputation.

Increase/ encourage more venues

Support it more all year round and not just in August

Improve advertising platforms

Improve parking, improve advertising platforms. I can't answer for any other venue as we are a popular venue for live music and do not have any major issues.

Invest in venues

Invest in the development of dedicated live music venues

Edinburgh
Live Music Census 2015



Chapter 4
Audiences

CHAPTER 4: EDINBURGH LIVE MUSIC CENSUS AUDIENCE SURVEY: OVERVIEW

Based on 307⁸² responses (89 online (Bristol Online Survey tool) and 218 surveys carried out on the night of the Census), our typical live music fan:-

Is a male or female full-time worker aged 38 living within Edinburgh (84%).

Is most likely to use Word of mouth, Facebook and Posters/flyers to get information about live music events.

Attends an average of six live music events per month, usually two (2.1) ticketed concerts/festivals, three (2.8) non-ticketed pub/club events, and one (1.4) ticketed club event per month.

Travels an average of 32 miles to see live music and is likely to spend £15 per month on transport to and from live music events. Spends an average of £29 on tickets and £49 per month on food/alcohol at live music events.

Spends an average of £93 on live music per month in total (tickets + food/alcohol + transport). The total average annual spend on live music per person for a typical live music fan is £1120.

The average monthly spend on recorded music such as CDs, records and music downloads is £12 and the average annual spend is £147.

Usually gets to gigs via public transport (69%) and is most likely to get home via public transport (60%), although is may also get a taxi when coming home (28% getting home from the gig compared to 11% using a taxi to get to the gig).

Prefers to see live music in music venues (44%) but sees live music most often in pubs (76%), followed by music venues (67%) and concert halls (58%).

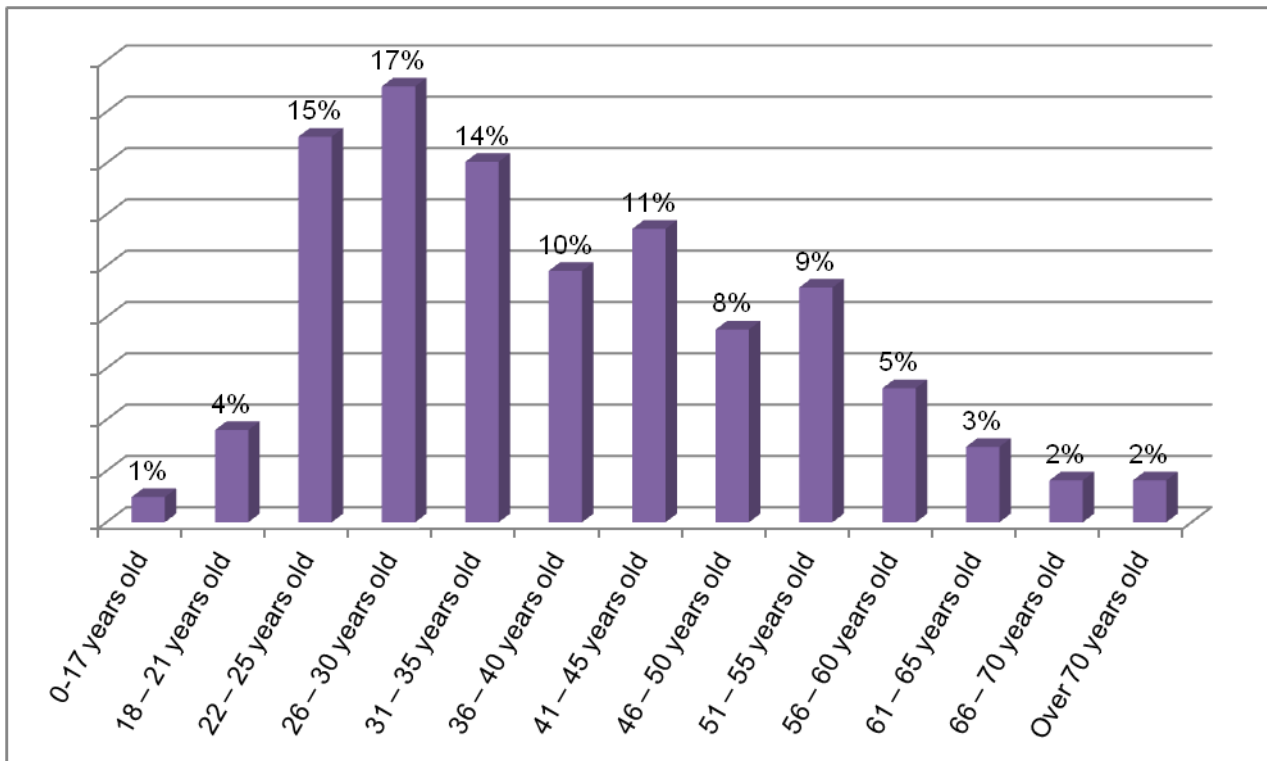
Is most likely to regularly go to see rock music (61%), but also enjoys folk (37%) and modern jazz (34%).

⁸² It should be noted that the Victorian Live Music Census 2012 garnered 560 online responses in total – Melbourne has a population of over 4 million whilst Edinburgh’s population is just under half a million (Victorian Live Music Census 2012 - http://www.musicvictoria.com.au/assets/Documents/Victorian_Live_Music_Census_2012.pdf).

SECTION 4A: Audience Profile

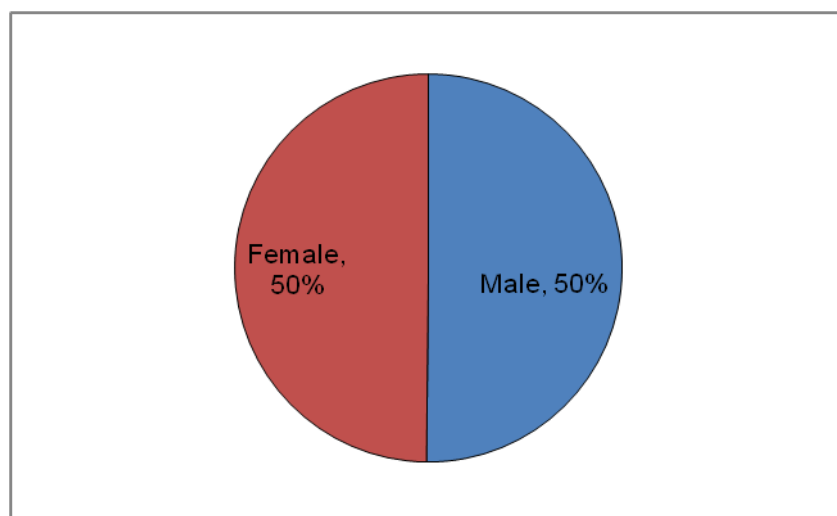
Age Group of Respondents

The data shows that the 35-and-under range make up the highest proportion of gig goers (51%), and the average age of respondents is 38.⁸³



Gender of respondents

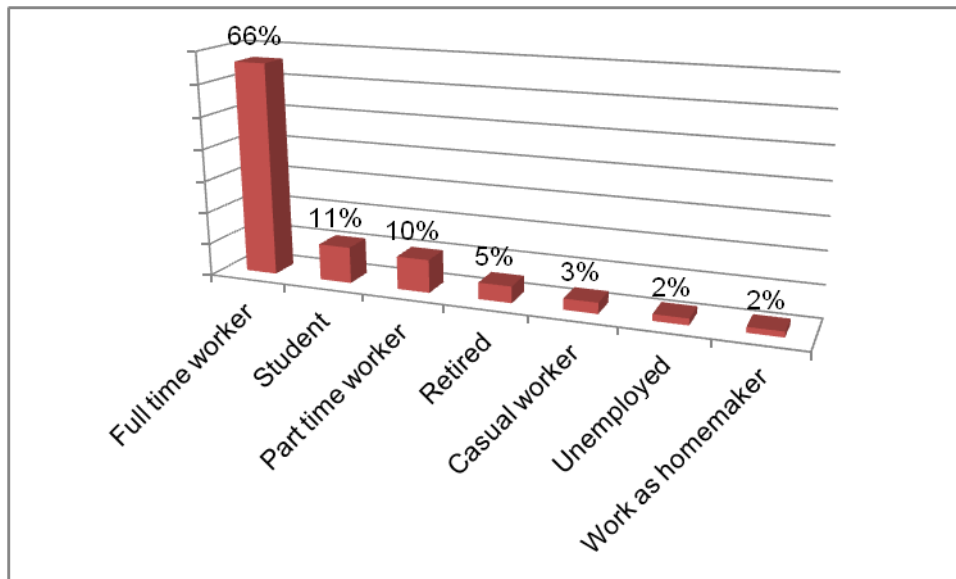
The gender balance of respondents is equal which, we would suggest, reflects the general audience for live music.



⁸³ It is worth noting that the Association of Independent Festivals (AIF) found that the average age of respondents was 33 (Webster 2014, p. 35 - <http://aiforg.com/wp-content/uploads/AIF-Six-Year-Report-2014.pdf>).

Occupation of Respondents

The majority of respondents are full-time workers, although, perhaps unsurprisingly in a city with three universities, students also make up a significant proportion of respondents.⁸⁴

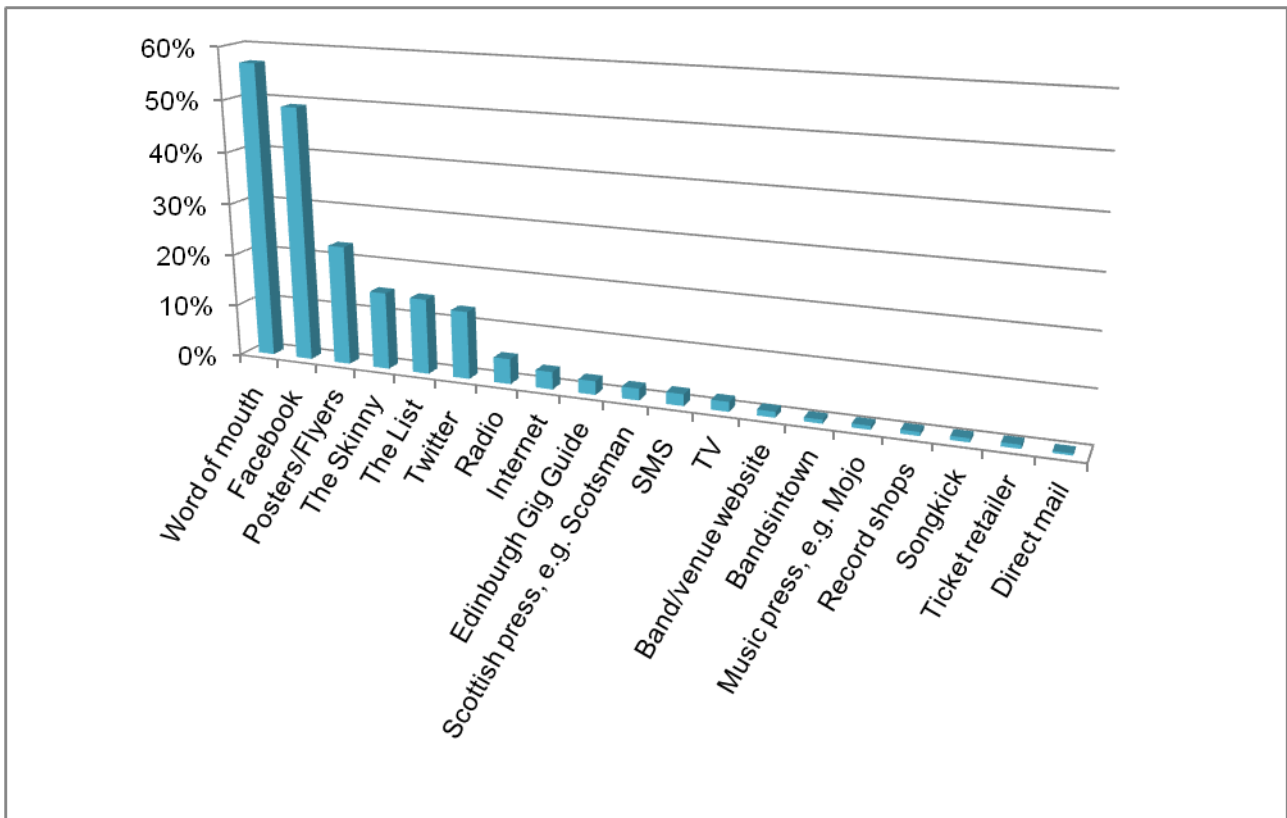


⁸⁴ It should be noted that because the survey took place in June, i.e. outside term time, the number of students taking part in the survey could be lower than perhaps it would have been during term time. It should also be noted that the online survey forced one answer for this question whereas the hard copy survey allowed multiple answers, therefore data has only been used from the hard copy survey for this question where the respondent only gave one answer (96% of total respondents).

SECTION 4B: Information Gathering

Where do you get your information on live music?⁸⁵

Respondents were asked to choose the three sources of information they use to get music event information. Word of mouth scored highest, followed by Facebook. Posters/flyers, The Skinny, The List and Twitter were also all significant responses, although less than half as popular as the top two. As Facebook could be described as digital word of mouth, it appears that the most used – and most trusted – source of live music information comes from people’s social networks, both off- and online.

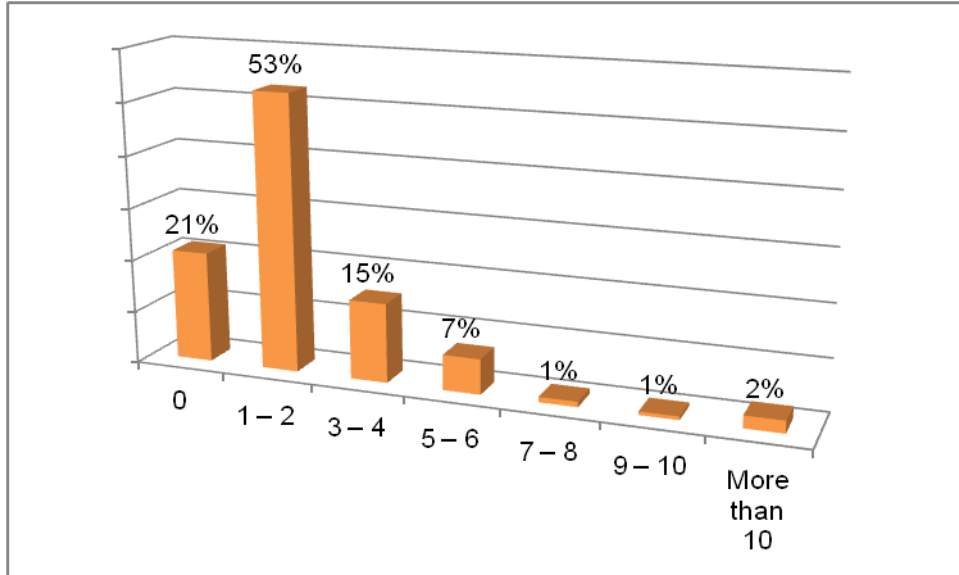


⁸⁵ It should also be noted that the online survey only allowed for three answers for this question whereas the hard copy survey allowed multiple answers, therefore data has only been used from the hard copy survey for this question where the respondent gave three or fewer responses (88% of total respondents). It should also be noted that the element of self-selection inherent in any voluntary participation in a survey was greater for the online survey – where respondents had to decide to follow the link and complete the survey – than for the hard copy surveys, where they were presented with questionnaires by volunteers or staff members at participating venues.

SECTION 4C: Live music habits

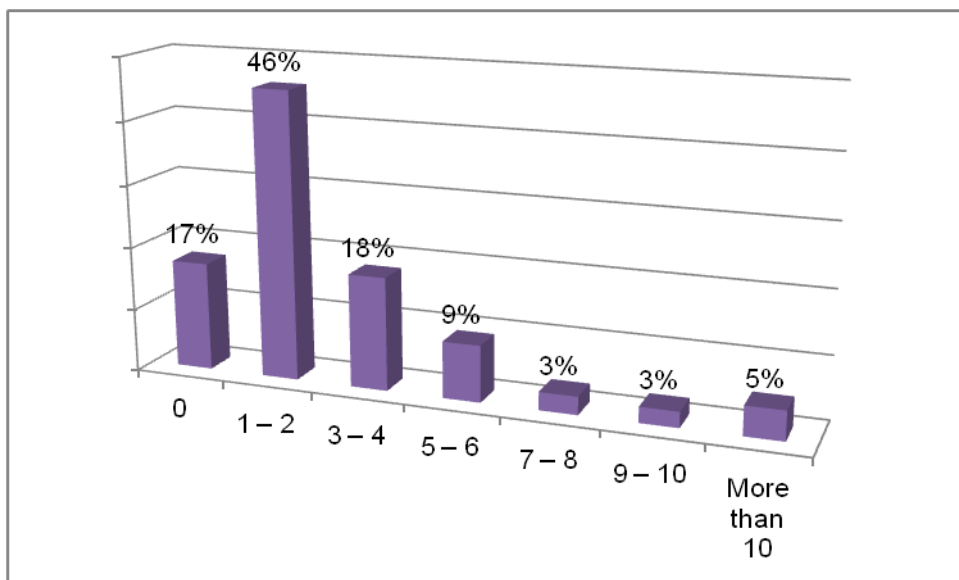
Number of times in a month see live music (including featured DJs) at a concert/festival (ticketed event)

The majority of respondents see live music at a ticketed concert or festival 1-2 times a month, with the average closer to two (2.1) times per month.



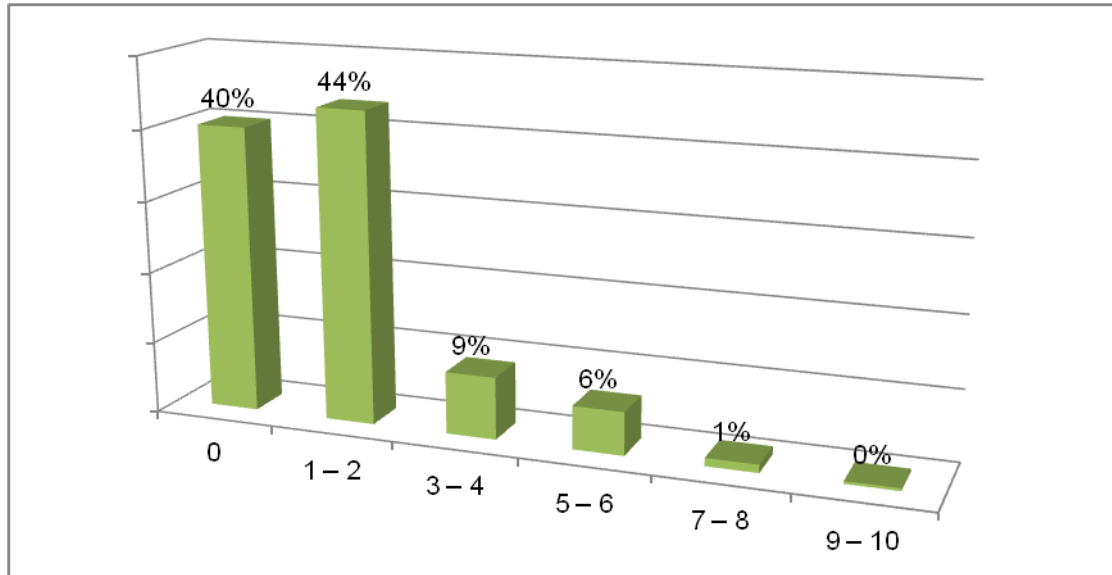
Number of times in a month see live music (including featured DJs) at a pub/club (non-ticketed event)

Most respondents see live music at a non-ticketed pub or club 1-2 times a month, with the average closer to three (2.8).



Number of times in a month see live music (including featured DJs) at a club (ticketed event)

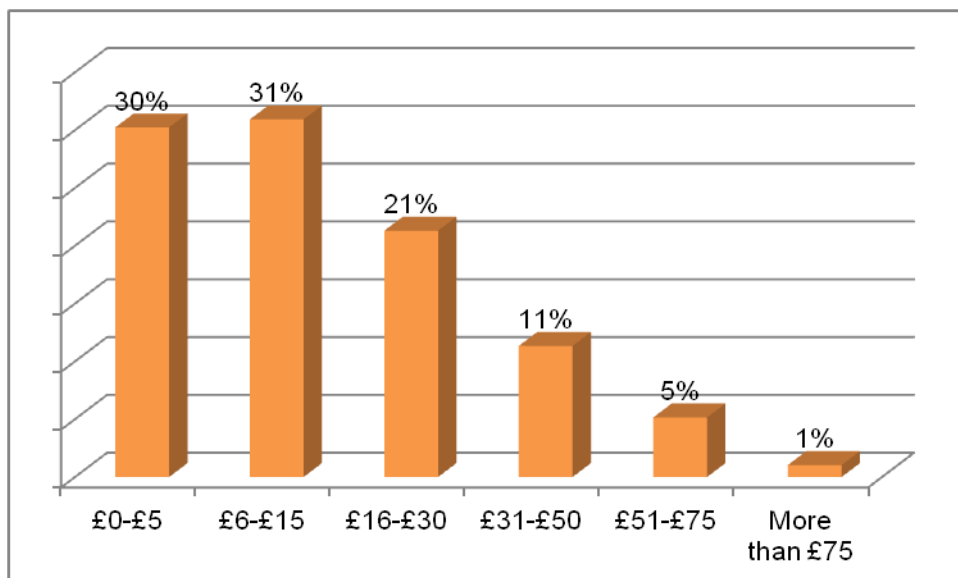
Most respondents see live music at a ticketed club zero or 1-2 times a month, with the average closer to one (1.4).



SECTION 4D: Spending habits

Average spend on concert tickets per month

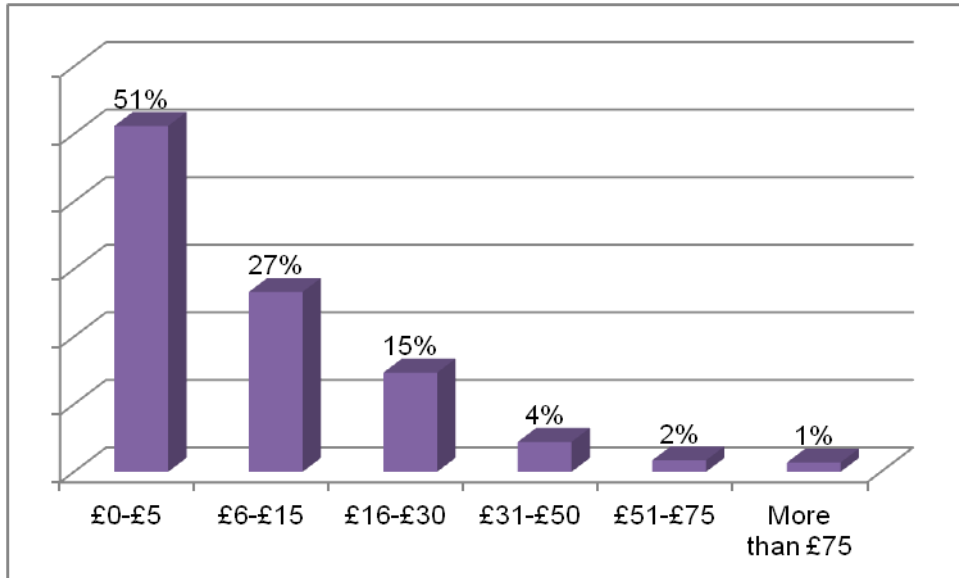
The average monthly spend on concert tickets is £17.65⁸⁶ and the average annual spend is £212.



⁸⁶ Figures for Section D have been rounded to the nearest 5p for monthly spend and to the nearest £1 for annual spend.

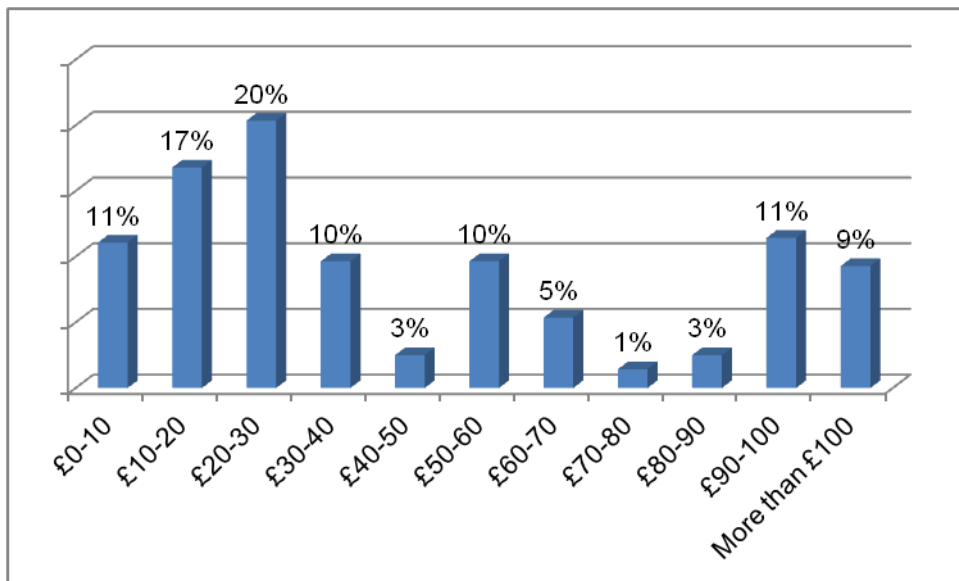
Average spend on club/pub entry

Average spend on club/pub entry is lower than that on concert tickets, with the average monthly spend at £11.50 and the average annual spend at £138.



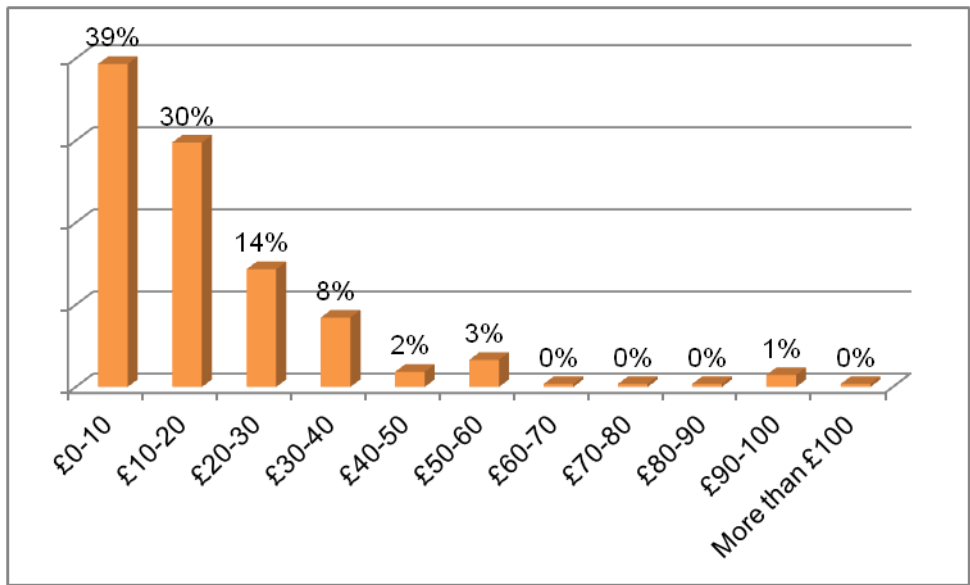
Average monthly spend on food/alcohol at live music events

The average monthly spend on food/alcohol is £49.25, with the average annual spend at £591.



Average spend on transport to and from live music events

The average monthly spend on transport to and from live music events is £14.90, with the average annual spend at £179.



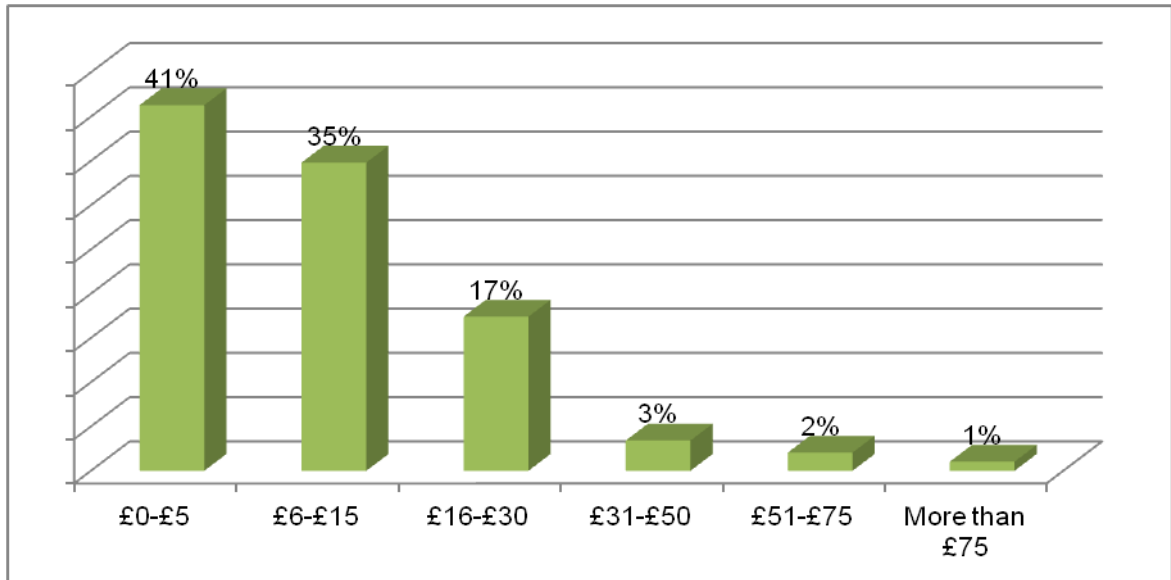
Average total spend on live music

The average monthly spend on live music per person for a typical live music fan is **£93.30** (tickets + food/alcohol + transport). Taking the average number of live music events attended each month to be 6.3, the average spend per live music event is £15.⁸⁷

The average total annual spend on live music per person for a typical live music fan is **£1120**.

Average spend on CDs/records/music downloads

The average monthly spend on recorded music such as CDs, records and music downloads is £12.25, and the average total annual spend is £147.

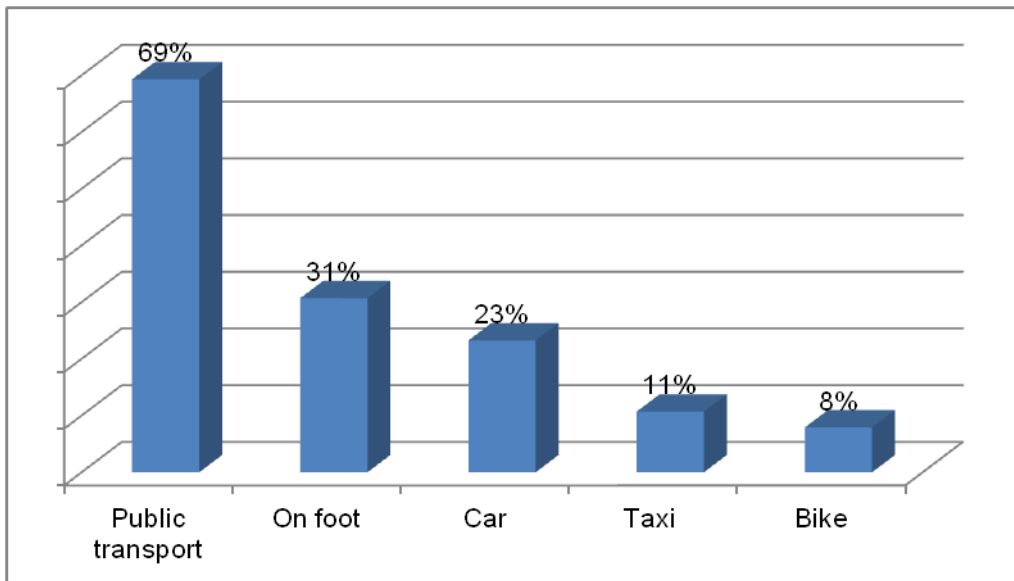


⁸⁷ NB while this figure appears on the low side, it should be pointed out that the majority of survey respondents are based in Edinburgh (84%) and therefore transport costs will be low; in addition, the majority of music events attended are in pubs, a large proportion of which do not charge on the door.

SECTION 4E: Travel

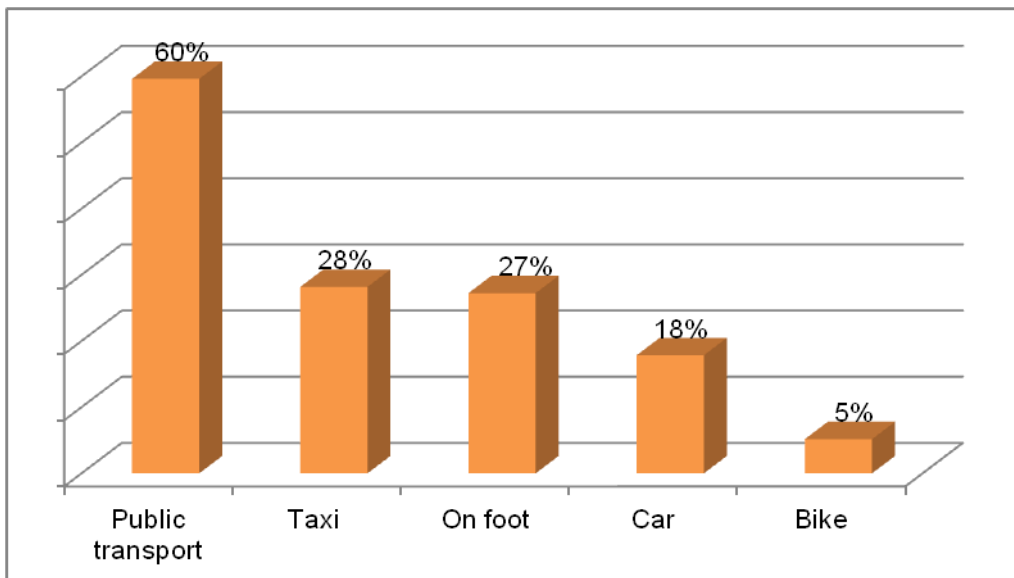
How respondents usually travel to gigs

The most popular means of travelling to gigs is by public transport.⁸⁸



How respondents usually get home from gigs

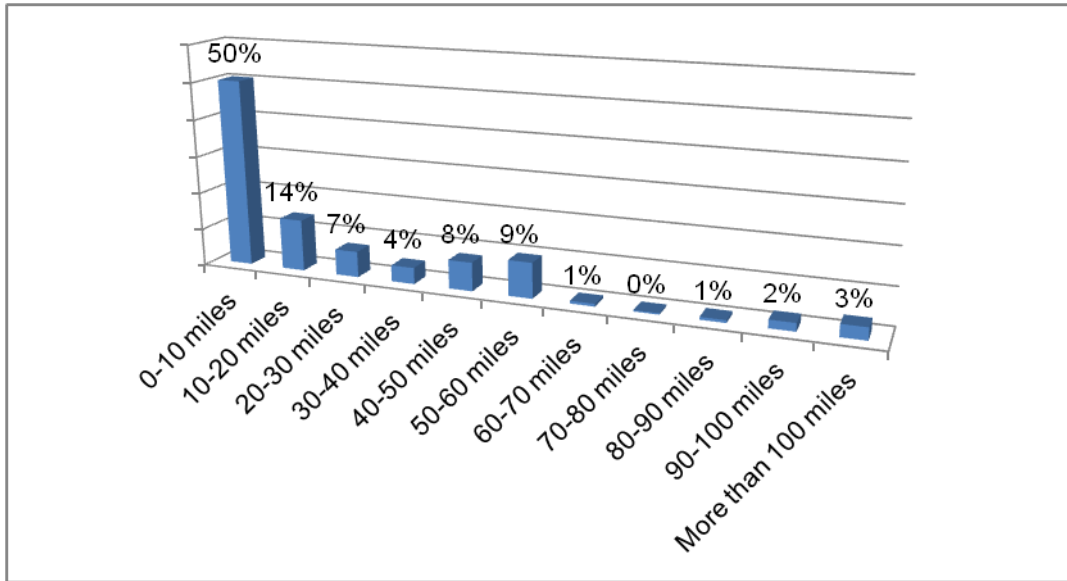
The majority of respondents get home from gigs via public transport although fewer use public transport to get home than to get to gigs. Meanwhile, the use of taxis more than doubles, suggesting that while some use public transport, car, bike or walk to get to the gig, they may use a taxi to get home (also perhaps because public transport options are limited after midnight or because they have been drinking).



⁸⁸ NB these results are taken from the hard copy survey only. The online survey allowed one response only whereas the hard copy allowed multiple responses, hence the two datasets cannot be compared (the data above are based on 71% of the total respondents).

Average distance travelled in miles

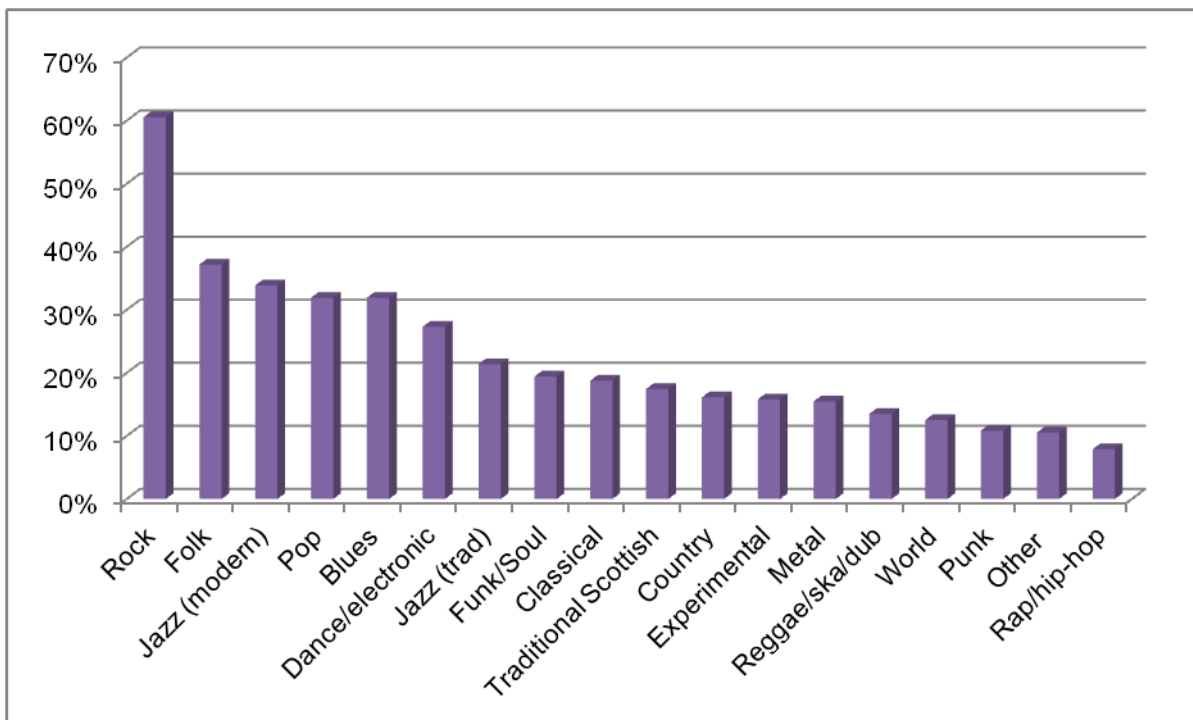
The average distance travelled to see live music is 32 miles but half the respondents travel less than 10 miles to see live music.



SECTION 4F: Venue and music preferences

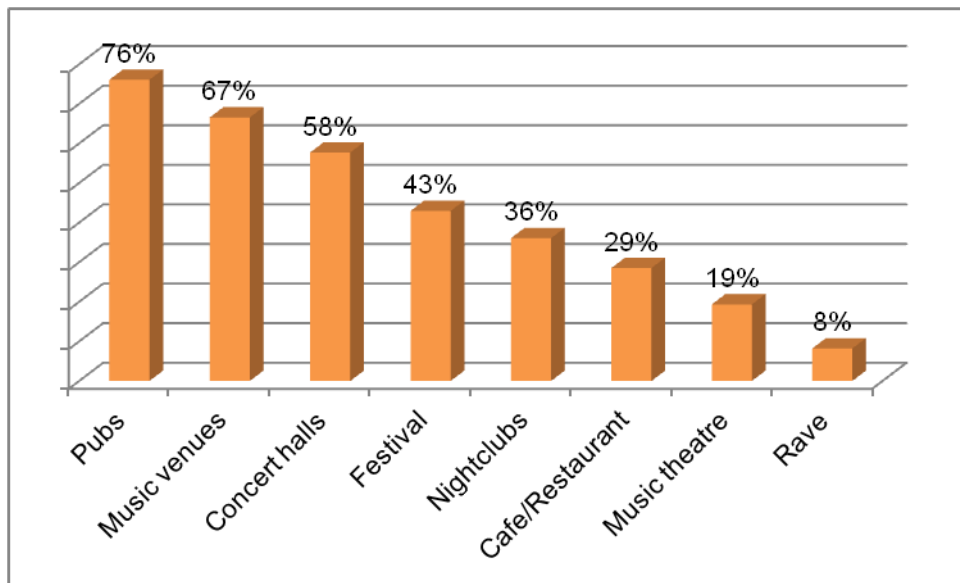
Music genre

Respondents are most likely to regularly go to see rock music (61%), but also folk (37%) and modern jazz (34%).



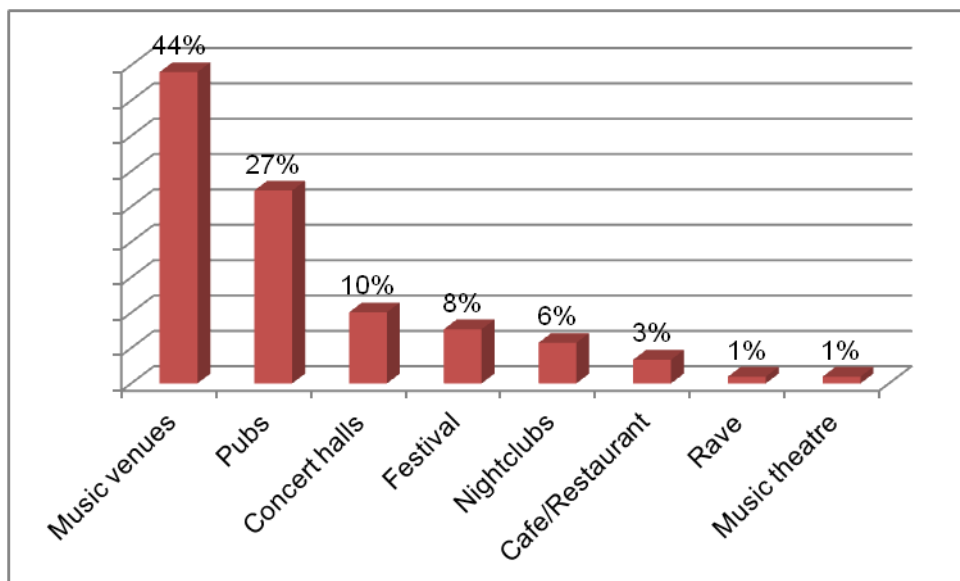
Where do you go to see live music?

The three most regularly visited types of venues are pubs, music venues and concert halls.



Preferred type of venue⁸⁹

Respondents' favourite way to see live music is in music venues, followed by pubs and concert halls.



⁸⁹ The online survey forced one answer for this question whereas the hard copy survey allowed multiple answers, therefore data has only been used from the hard copy survey for this question where the respondent only gave one answer or, where the respondent ranked venues, has only used the first choice (69% of total respondents).

SECTION 4G: Qualitative data on what would encourage respondents to see more live music in Edinburgh

The question asked in the audience survey was 'What would encourage you to see more live music in Edinburgh?' The qualitative data listed here is a selection of responses rather than all the audience survey responses – they have been loosely grouped under broad headings but some fit under more than one heading.

More/better venues of differing sizes, particularly mid-size/large

Venues like the Picturehouse, drawing bands like mudhoney, mark lanegan etc etc to edinburgh. I did see them in edinburgh in the picture house now, it has to be glasgow as there arent suitable venues in edinburgh (?). Id love to see more of the bands i like in venues the size of the picture house in Edinburgh

More choice of venues to encourage smaller bands to come back to Edinburgh and not just book in Glasgow.

more live music i like! I dont go to gigs because I like gigs, i go because of the bands / people who are playing. many bands i like only play glasgow (good venues and a proper audience) so I used to go there a lot but i am too old for that sort of thing now and only go through occasionally. We have sketchy, expensive venues and as a result a lack of a decent live music audience. i like Glasgow's 13th Note / Stereo model of venue..

More venues. I have to go to Glasgow too often.

Better choice of venues, more gigs and more variety of acts and nights of the week. Basically emulate Glasgow's vibrant music scene!

More venues like The Picture House.

A really good music venue for big bands (NOT the Corn Exchange).

More reasonable sized venues 500-2000 sized that are fit for purpose. Council support both financial and allowing free rental of disused council properties would be a significant support. This would allow promoters to viably encourage more touring bands to the city without taking a hit. have a look at several models in German towns where the councils see this type of help as essential.

Edinburgh seems to be "off circuit" for many mid size touring artists who seem to think playing Glasgow ticks the Scotland box. Not sure why this is, suspects it's because there's no mid size venues...

More small to mid-sized venues such as "The Venue" that used to be in Edinburgh. Fewer noise complaints from stupid neighbours that move in next to venues and then complain. More venues + fewer complaints/council acting the arse = more live music in Edinburgh/more bands wanting to play here instead of Glasgow.

More venues to encourage bands to play in Edinburgh so I don't have to travel to Glasgow every time. Don't go to many gigs now as have to travel and costs too much all in all.

Better venues filling the 800-3000 cap 'hole' that Edinburgh currently has.

Choice, better mid scale venues. Note: music doesn't just happen on weekends (Q1): Went to Glasgow, Tue 9th to see Patti Smith, concert hall, £35 ticket, £15travel, £20 food and drink. With

the right venues and culture, that money would be here... Note 2: distance travelled per month? (No timeframe in Q10)

Quite simply a better selection of bands playing in Edinburgh. Electric Circus, Sneaky's, Voodoo rooms and Henry's all do their bit, but the list of 'good' touring bands playing them is crap, so they have to fill their calendar with woeful local bands with beards and acoustic guitars. Glasgow has 'name' bands playing there every week in their smaller venues - Broadcast, Stereo, SW3, King Tuts etc, not to mention Oran Mor and ABC. I've been going to gigs in Edinburgh since 1974, and I'm actually going to more now than any other time in my life. Its a shame that I have to go to Glasgow so often to see the smaller touring bands that play there and avoid Edinburgh.

Better venues. Glasgow has more, better venues therefore more bands. (for bigger bands at least)

More choice in venues + acts. Edinburgh really needs a better variety + size of venues like Glasgow.

A better selection of venues, especially for medium sized bands

More bands playing in Edinburgh - default to Glasgow due to superior venues

Better venues of differing sizes which would allow more varied programming.

Relaxation of noise/licensing restrictions

A relaxing of the ludicrous licensing laws regarding time and noise levels. The buses tinkling over our fabled cobbled streets drown out most of the music.

Edinburgh requires more support and understanding from its council around issues such as licencing hours, noise restrictions and club closures; as opposed to the combative and antagonist stance the council currently takes toward the city's homegrown music and arts community. Embracing the world's artists for one month a year, while wilfully neglecting and actively stamping out local talent for the other eleven, does not qualify Edinburgh in its aspirations to be considered an international centre of culture.

Please, I come from Buffalo, NY, where the pubs are open until 4am. Stop these ridiculous curfews. Stop douchefuck pub owners from giving musicians shit when their real problem is an under loved body.

A radical limitation of various sound, etc restrictions; a radical reduction of ticket prices; a radical humanisation of 'curfew' hours.

Relaxation of archaic decibel levels - re: noise in flats above pubs. Sensible approach to live music economy from EDC.

Relaxation of current noise limits in the city centre.

More music in pubs

More pubs having live music

More pubs with live but quieter music

More live music in local pubs

There is a serious lack of basic financial support for traditional folk musicians to perform in sessions in pubs, which is massively enjoyed by visitors, but paid lip service by publicans. A

wider range of world music, jazz, folk and traditional music outwith the Fringe would be good. A world class venue to replace the wreck of the Ross Bandstand, and more small 300 or so seater venues for minority music. No pay to play venues! Play and get properly paid by the venues! Live music is very important, and must be supported financially much better than at present.

Better advertising

A specialist web page with what's on, relaxed informal environments that you don't have to book tickets

Better publicity of when gigs are happening and more larger capacity venues

More of it (or just knowing about it) + if I had a reliable source of good gig info.

Centralised advertising - 1 stop shop

1 proper [internet] website which would include all music events in Edinburgh

Lower prices

Cheaper tickets. I tend to only go to gigs I can get cheap or free tickets to. I don't resent paying, I'm just really skint!

Cheaper tickets, more marketing, a mid-sized venue like the picture house - we seem to be losing out to Glasgow with a lot of bands.

Cheaper tickets More variety More funk/soul bands

Lower ticket prices, better sound quality

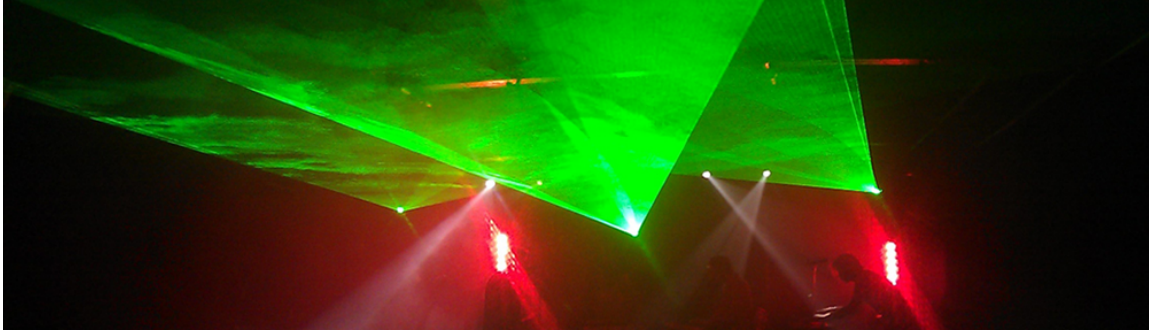
Better transport

Cheaper car parking and later trains for returning home

Child-friendly policies

More kid-friendly policies from CEC licencing dept, less red tape with regard to promoting live events and a reality check over allowing super zealous neighbours to shut down semi acoustic concerts on Sunday afternoon and thus closing off income streams for local musicians.

Edinburgh
Live Music Census 2015



Chapter 5
Musicians

CHAPTER 5: EDINBURGH LIVE MUSIC CENSUS MUSICIAN SURVEY: OVERVIEW

Based on 234 online responses to our survey, our typical live music performer:-

Has an average age of 40, is mostly likely to be male (73%), and has been active within the music industry/making money from music for 17 years (e.g. paid performances, selling recordings).

Is most likely to play the guitar (33%) and vocals (30%) and most regularly performs rock (48%) and folk (45%).

Is unlikely to earn the majority of his income from music (56% do not earn the majority of their income from music). The majority of his total income comes from sources other than his music activities, which account for the other 12%.

Has had some formal music tuition/training (63%) but is much less likely to have had formal music industry training (16%). He is very likely to be self-managed (91%), and rates his music industry knowledge as 'above average' (41%). He would access more training if they thought it would benefit his career (49%).

Is equally likely to operate on a casual/informal basis or as a sole trader if he is self-employed as a musician (both 41%).

Plays an average of five (4.6) gigs per month of which 61% are paid; the majority of which are paid via a straight fee (69%).

Will earn an average of £92 per gig if he is a solo or duo act, and an average of £234 (paid jointly) if he is in a band.

Is equally likely to be a member of no societies or unions (39%) as he is to be a member of the Performing Rights Society (PRS), and is slightly less likely to be a member of the Musicians' Union (36%).

Is most likely to use Facebook (91%) or word of mouth (87%) to promote his gigs, with email lists (51%), Twitter (49%) and posters (48%) also used. Facebook is seen as by far the most effective method for promoting musical activities as a whole (80% total: 42% artist page, 38% personal profile).

Believes that in the last 12 months, the number of gigs he has performed has stayed the same as the previous year (38%) or decreased (34%) and believes that the overall scene in Edinburgh is shrinking (46%) or remaining static (35%).

Is most likely to have his main residence in Edinburgh (74%); he or his band are unlikely to have moved to Edinburgh from a rural area or another city/town for more music opportunities (19% *have* moved).

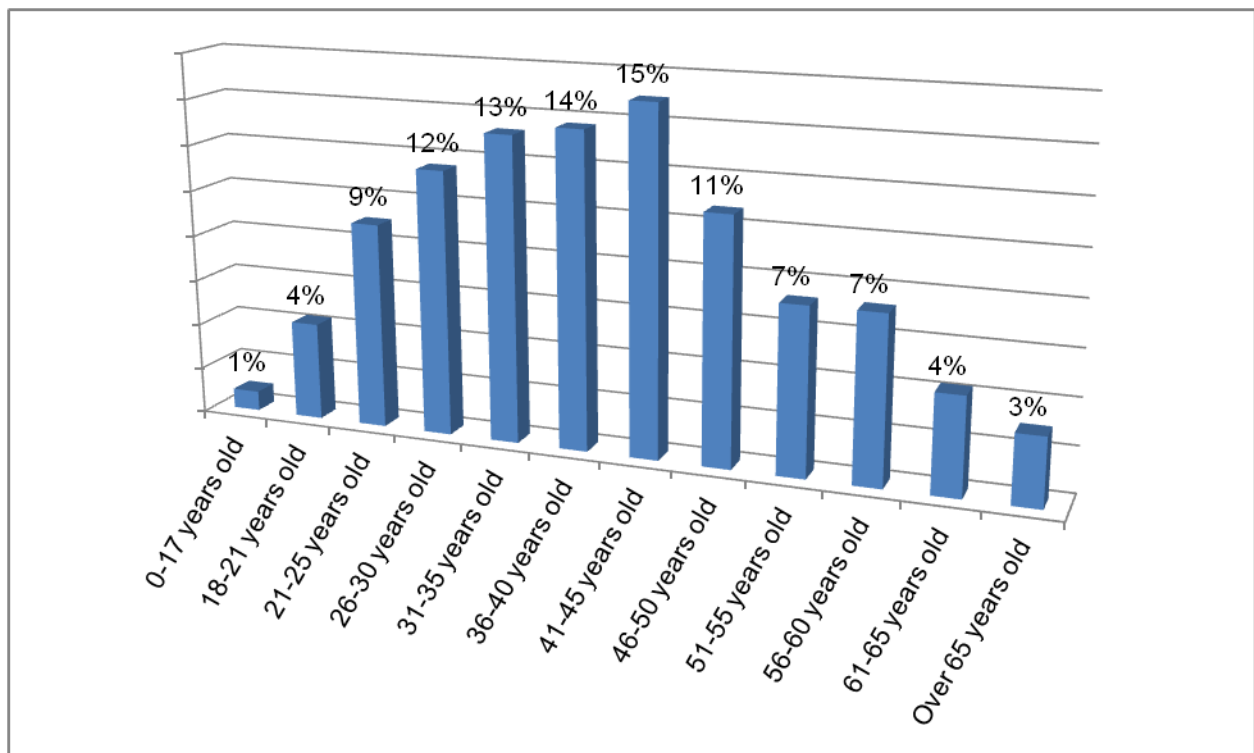
Is unlikely to have applied for funding or support from government or government related bodies (e.g. Creative Scotland, UKTI) (75% have not) but if he has applied, is slightly more likely than not to have been successful (58%).

In the last 12 months his gigs are likely to have been affected by noise restrictions (44%).

SECTION 5A: Musician Profile

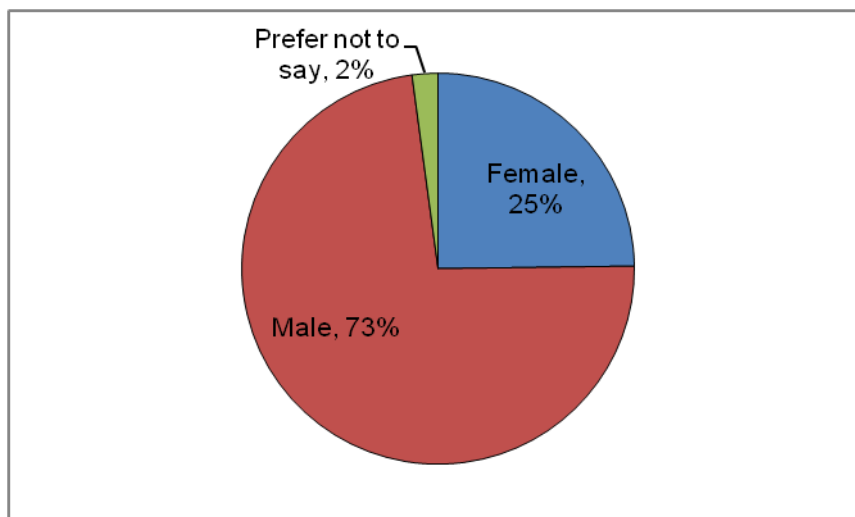
Age Group of Respondents

The average age of the respondents is 40.



Gender of Respondents

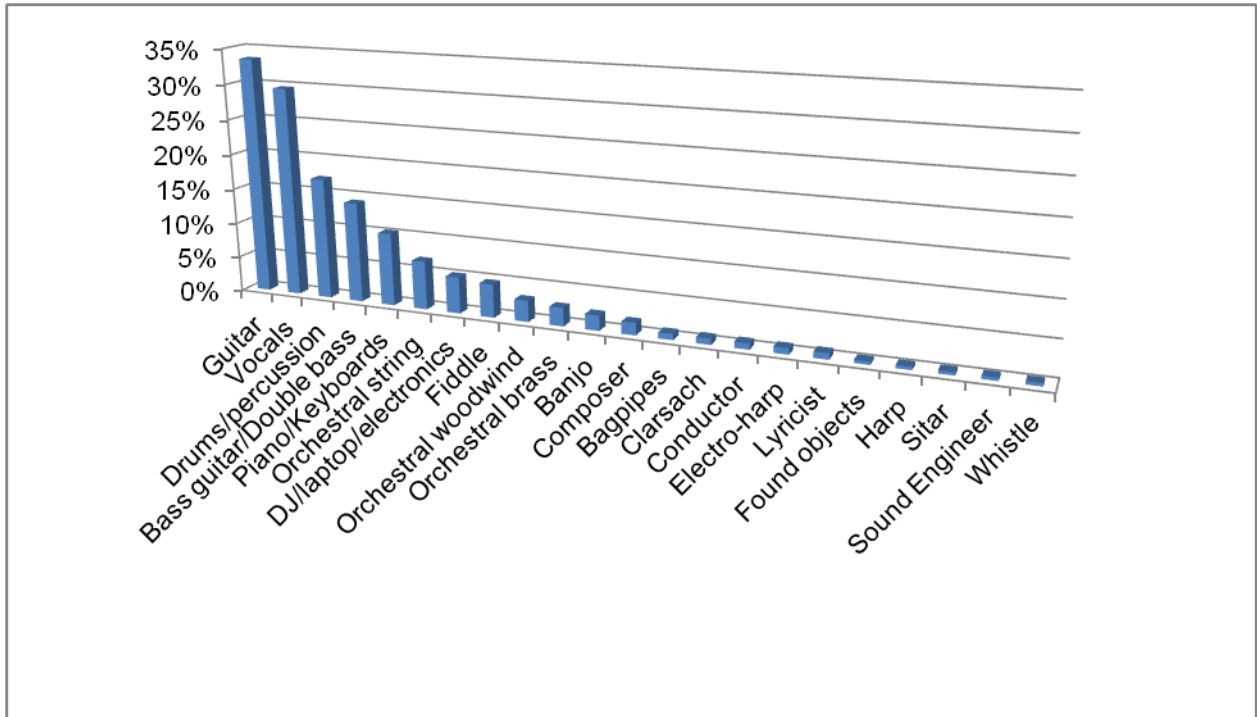
Unlike the audience survey, which is equally divided between male and female, the musician survey is very heavily dominated by male respondents, which, it is suggested, reflects the make-up of those regularly performing live music and/or identifying as a musician.⁹⁰



⁹⁰ This gender imbalance can also be found elsewhere in the sector. A 2013 survey, for example, showed that women make up only 13% of PRS for Music's membership of 95,000 songwriters, composers and music publishers (PRS for Music, 'PRS for Music presents Women in Music', 2013 - <http://www.prsformusic.com/aboutus/press/latestpressreleases/pages/prsformusicpresentswomeninmusic.aspx>)

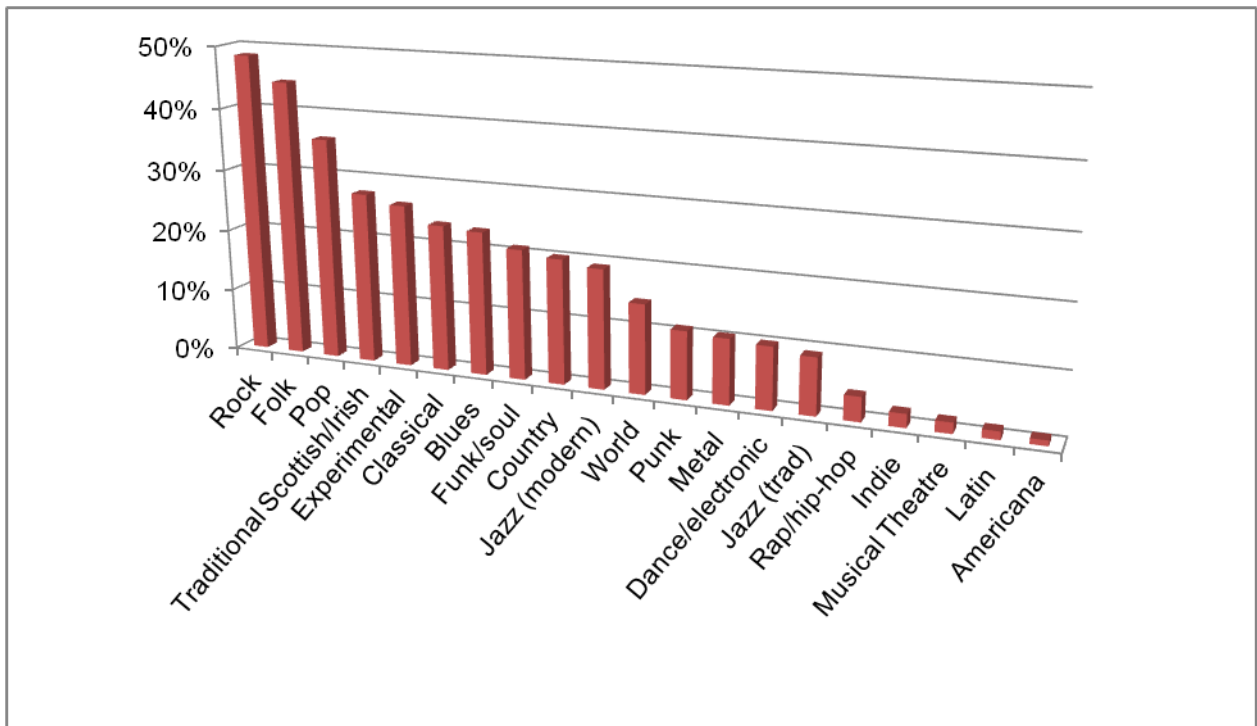
What are your main instruments?

Respondents are most likely to play the guitar (33%), followed by vocals (30%) and drums/percussion (17%).



What kinds of music do you regularly perform?

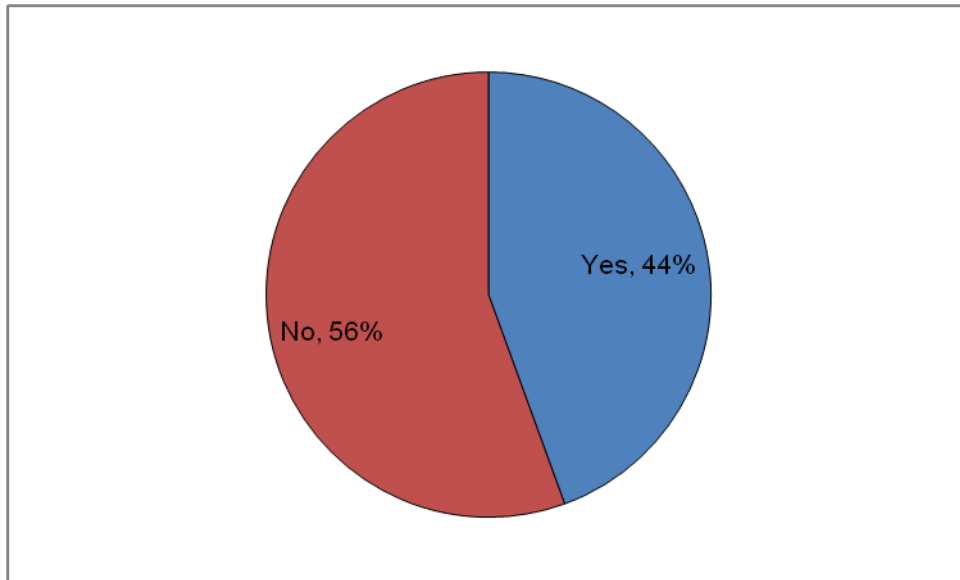
Most respondents regularly perform rock music (48%), followed by folk (45%) and pop (36%).



SECTION 5B: Music as Income

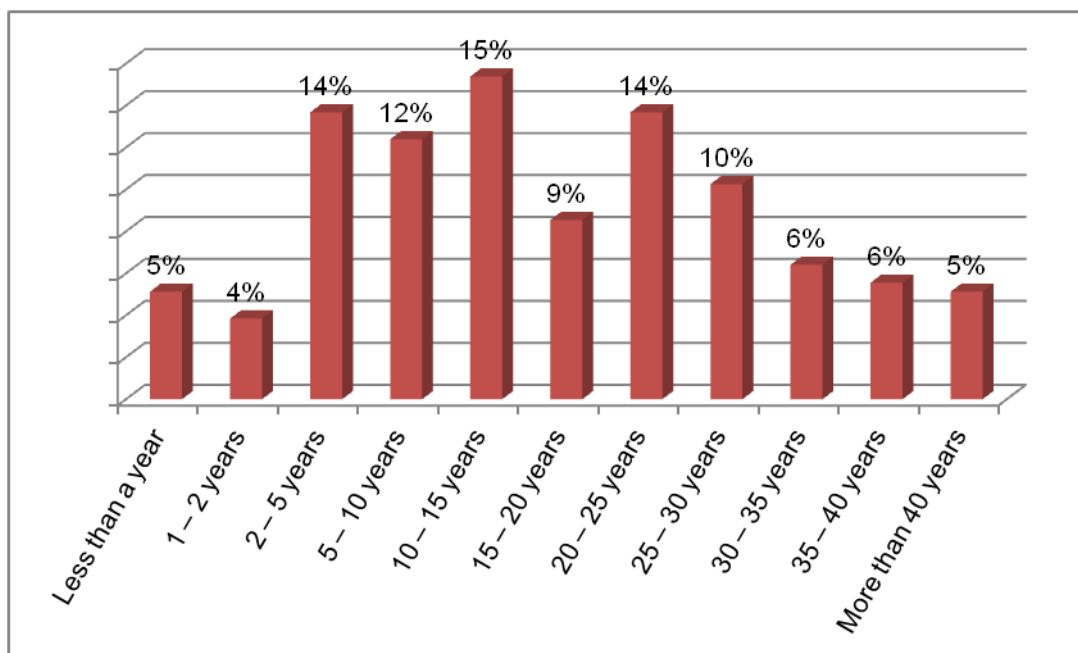
Is music your main source of income?

Music forms the main source of income for slightly less than half of the respondents (44%); income from music is earned through paid performances, selling recordings, etc. For those who do not earn the majority of their income from music, it forms an average of 12% of respondents' total income.



Length of time active within the music industry/making money from music

The average length of time respondents have been active within the music industry/making money from music is 17 years.



Do you have regular contracted employment as a musician (i.e. not self-employed) in any of the following capacities?

The majority of respondents do not have regular contracted employment as a musician. For those that do, teaching music at school (7.7%) or in Further/Higher Education (6.0%) is the most common form of regular contracted employment.

Music teacher (school)	7.7%
Music teacher (Further/Higher Education)	6.0%
House band	2.6%
Church/choir musician	1.7%
Multiple roles	1.7%
Depends on the gig	0.4%
Music teacher (private)	0.4%
Orchestra member	0.4%
I am not a paid/contracted musician other than as self-employed	74.4%
I am not a paid/contracted musician	4.7%

If self-employed, how do you trade?

If self-employed, respondents are equally likely to operate on a casual/informal basis or as a sole trader, although some operate multiple modes of operation

On a casual/informal basis	41%
Sole trader (self-employed for tax purposes)	41%
Not sure	9%
Multiple modes of operation	5%
Company (your own company)	3%
Partnership	1%

Are you managed/self-managed?

The majority of respondents are self-managed.

Managed	9%
Self-managed	91%

Have you applied for funding or support from government or government related bodies (e.g. Creative Scotland, UKTI, Cultural Enterprise Office)?

The majority of respondents have not previously applied for government support, but if they have, are slightly more likely than not to have been successful.

Yes	25%
No	75%

If 'Yes' were any of these applications successful?

Yes	58%
No	42%

SECTION 5C: Musical and Music Industry Training

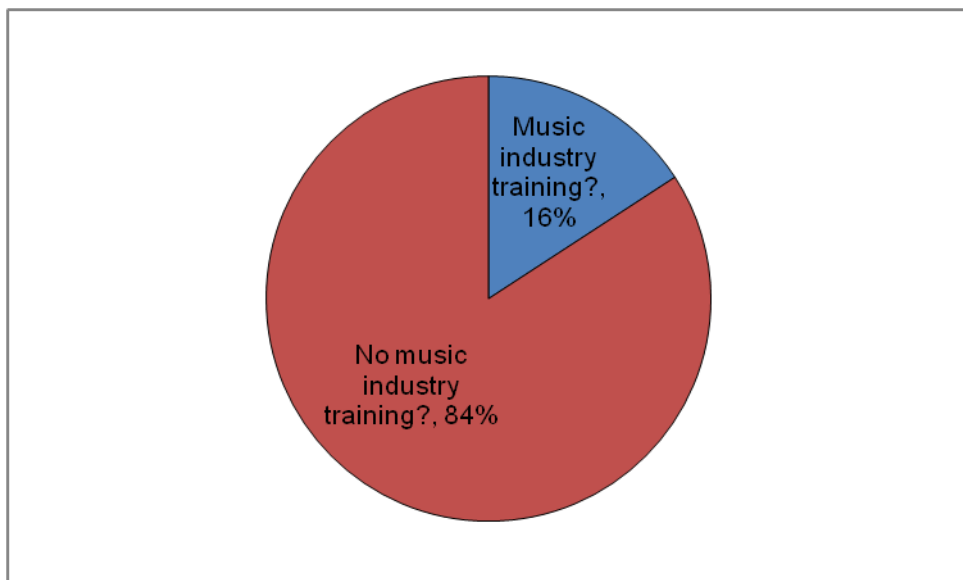
Have you had formal musical training?

The majority of respondents have had formal music training; 25% have achieved Associated Board Grade 8, the highest non-professional qualification offered by the Associated Boards of the Royal Schools of Music (ABRSM).



Have you had formal industry training?

The majority of respondents are unlikely to have had formal music industry training; if they have, it is most likely to have been up to undergraduate degree level.



If you have had industry training, to what level?

Undergraduate degree	43%
HND	30%
HNC	22%
Postgraduate degree	5%

How would you rate your knowledge of the workings of the music industry?

The majority of respondents rate their music industry knowledge as 'Excellent' or 'Above Average' (total 53%).

Excellent (highly detailed across different sectors)	12%
Above average (I have a good working knowledge of the industry overall)	41%
Adequate (I know roughly what I need to for my own work)	36%
Below average (I am sometimes unsure of the technical aspects of the music industry as they relate to my own work)	11%

Reasons for accessing more music/music industry training/tuition (multiple choice)?

Respondents would access more training if they thought it would benefit their career (49%).

You thought it would benefit your career	49%
It was cheaper	36%
More flexible options were available (night/part time study)	34%
It was easier to get to (transport links)	12%
I have no interest in further training/tuition	24%

SECTION 5D: Professional Membership

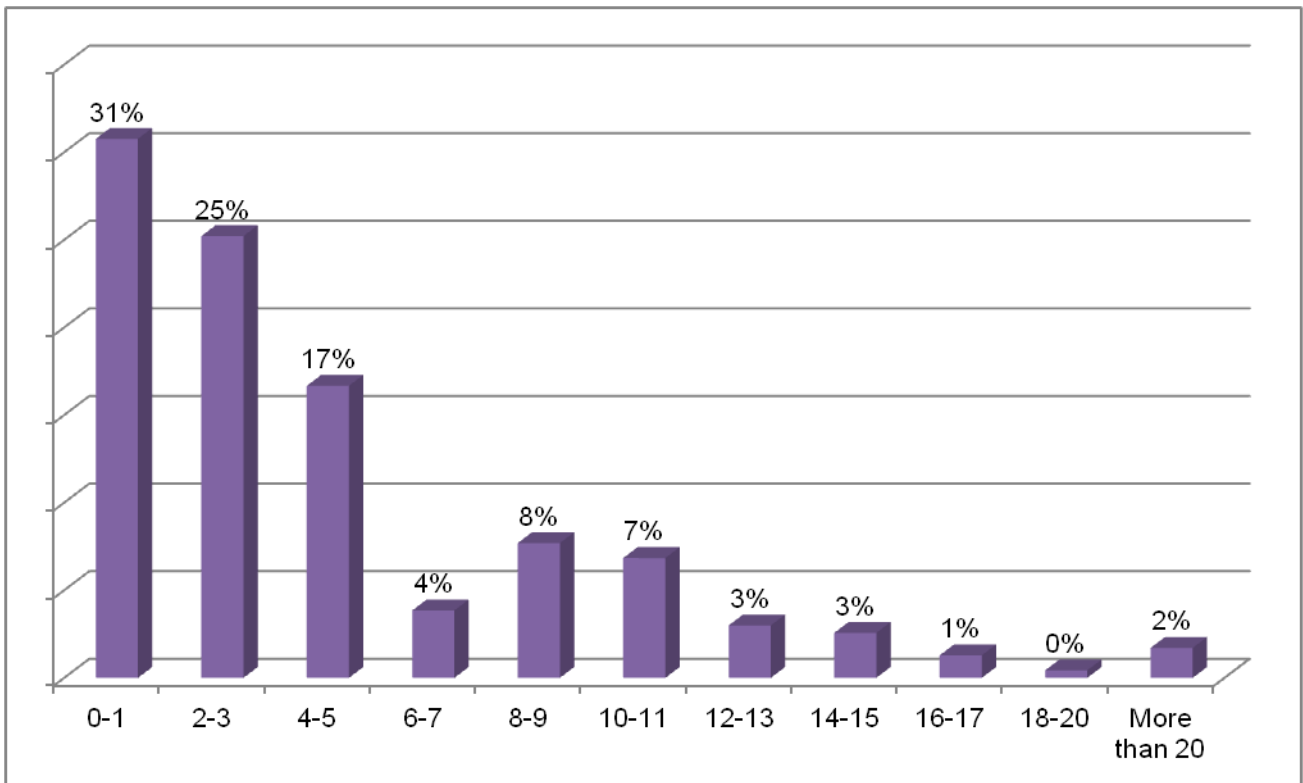
Are you a member of any of the following?

PRS for Music (Performing Rights Society)	38.5%
Musicians' Union	35.5%
Phonographic Performance Limited (PPL)	23.5%
Mechanical Copyright Protection Society (MCPS)	20.9%
APRA/AMCOS	0.9%
American Society of Composers, Authors and Publishers (ASCAP)	0.9%
Equity	0.9%
British Academy of Songwriters	0.4%
MAGA	0.4%
British Horn Society	0.4%
ISM	0.4%
Royal Musical Association	0.4%
Australian Performing Rights Association (APRA)	0.4%
Educational Institute of Scotland	0.4%
IMRO	0.4%
<i>None of these</i>	38.9%

SECTION 5E: Live Music Activity

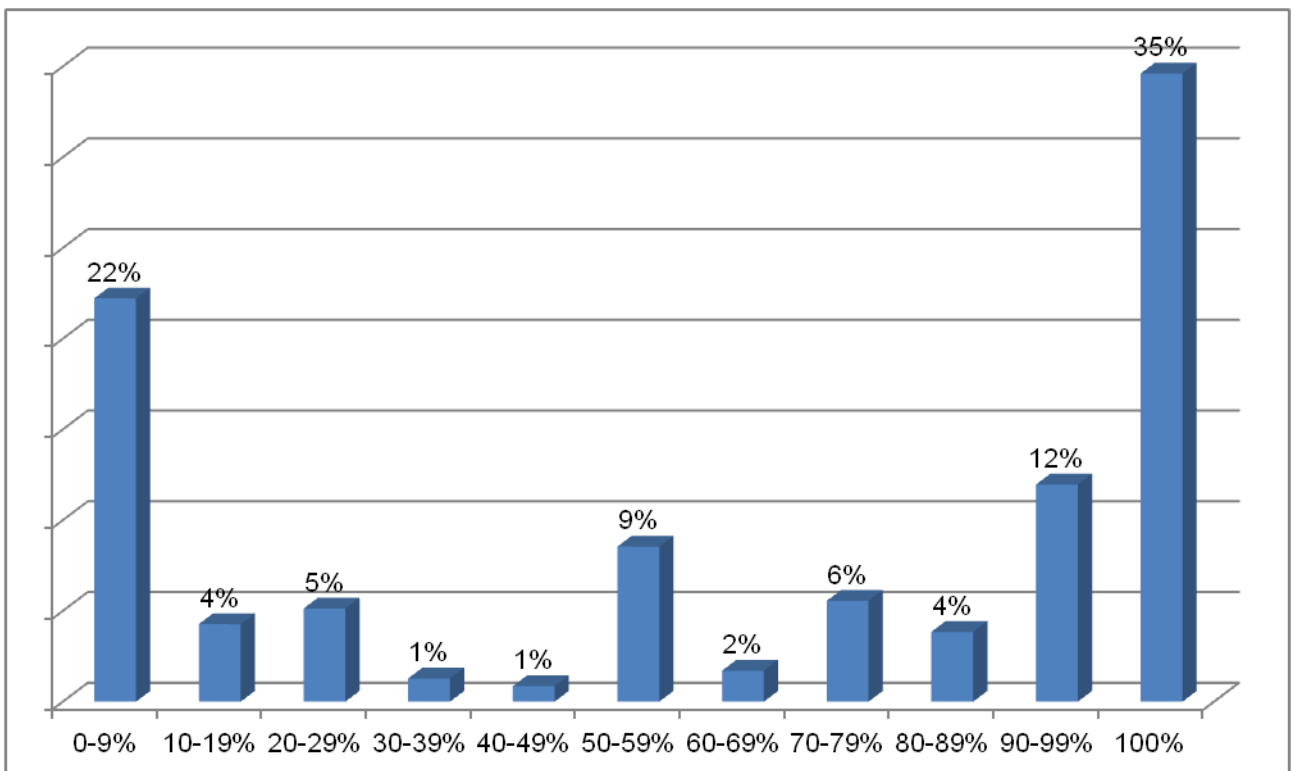
Average number of gigs per month

The average number of gigs performed each month is five (4.6).



What percentage of your gigs are paid?

The average percentage of paid gigs is 61% but 35% of respondents are paid 100% of the time.



Of paid gigs, what percentage are?

The majority of respondents get paid a straight fee (69%).

Straight fee (paid by employer – e.g. orchestra, bandleader)	Guarantee (from venue/promoter)	Percentage of door take	Percentage of bar take	Guarantee vs door/bar
69%	50%	34%	10%	12%

On average, how much do you earn per gig?⁹¹

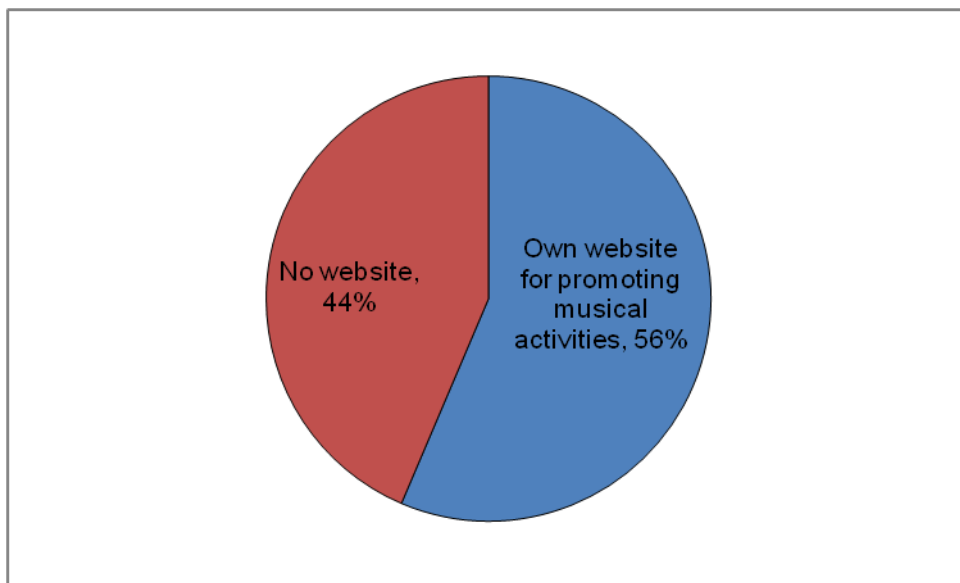
As a solo artist/duo	£92
As a band, paid jointly	£234

⁹¹ These figures are based on the option of 'Less than £20' being recorded as an average of £10.

SECTION 5F: Promotion

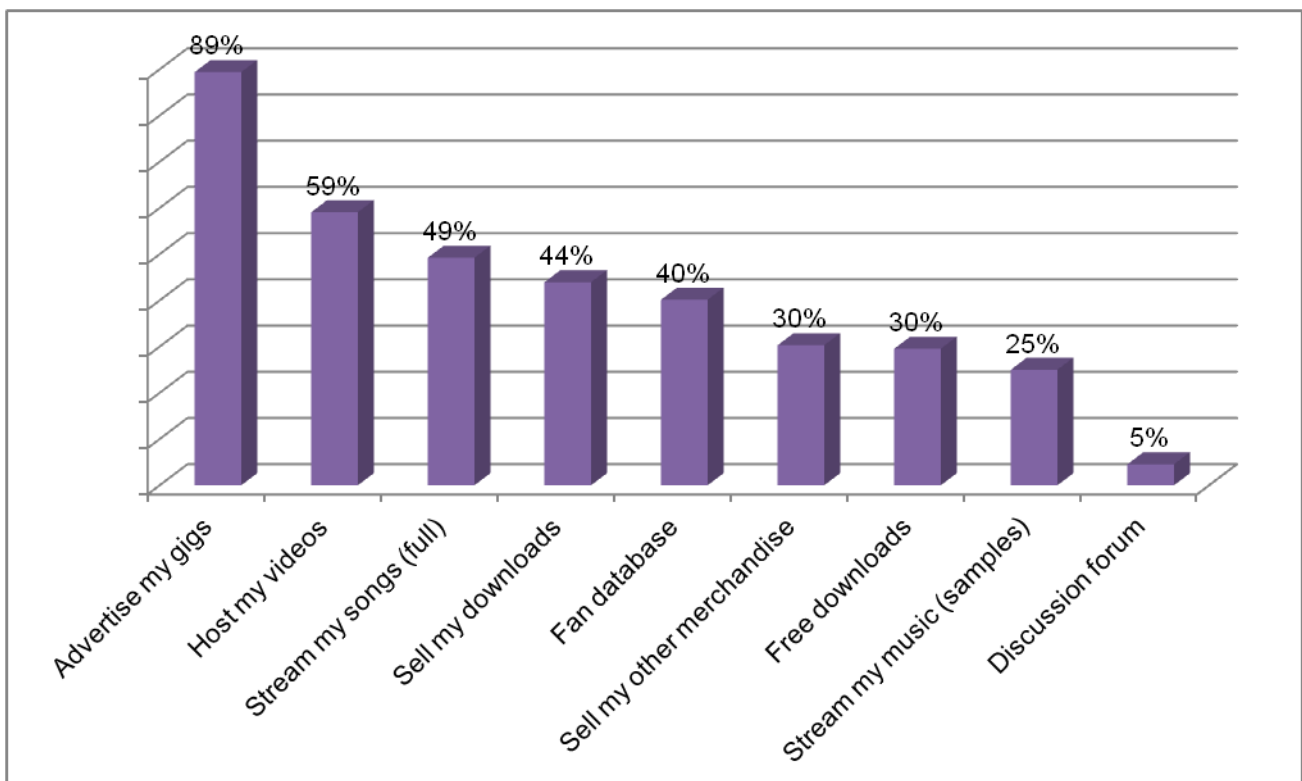
Do you have your own website for your musical activities?

The majority of respondents have their own website, but a significant proportion (44%) do not.



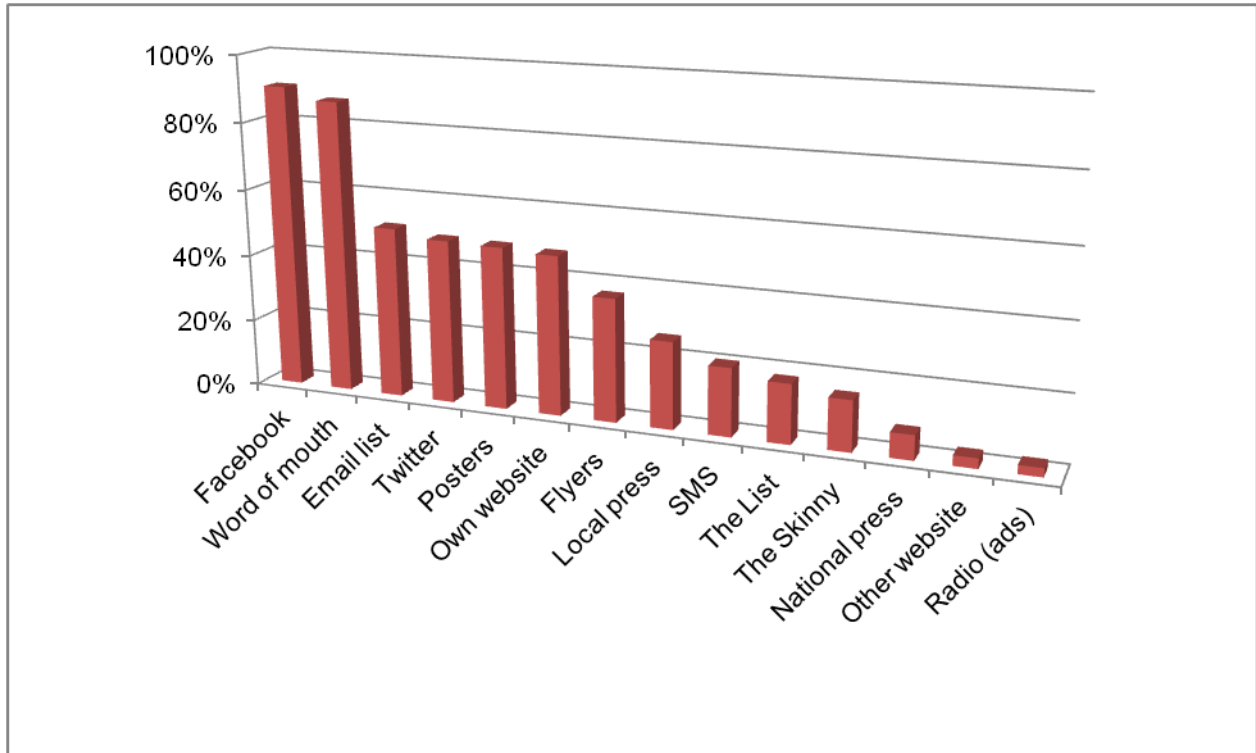
If you have your own website, what do you use it for?

The majority of those who have their own website use it to advertise their own gigs, host their videos, and stream their (full) songs.



When promoting your own gigs, which of the following do you regularly use?

The majority of respondents are most likely to use Facebook (91%) or word of mouth (87%) to promote their gigs, (which correlates strongly with how audiences prefer to get their information about live music events); email lists (51%), Twitter (49%) and posters (48%) are also used.



Which one of these do you find to be generally the most effective for promoting your musical activities as a whole?

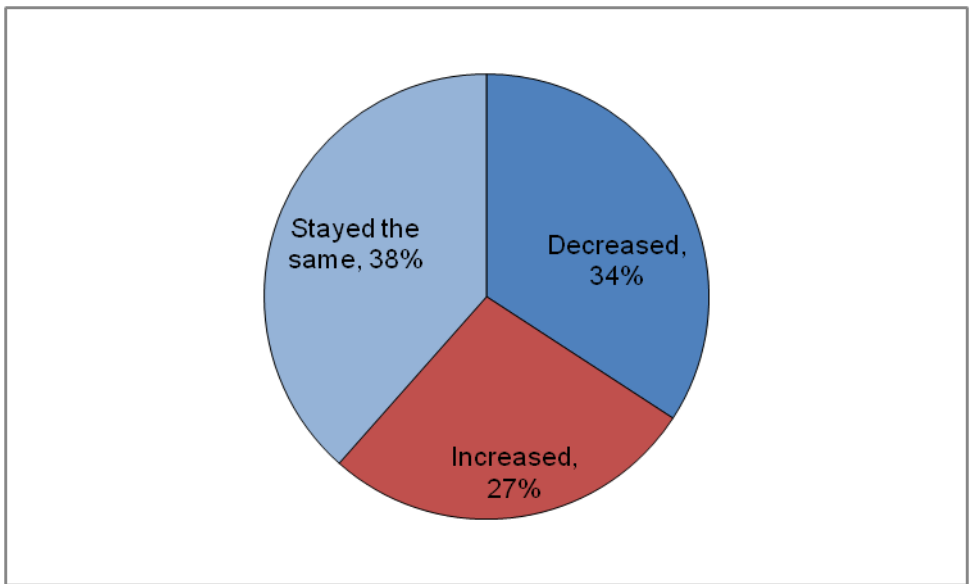
Facebook is seen as by far the most effective method for promoting musical activities as a whole (80% total: 42% artist page, 38% personal profile).

Facebook (artist page)	42%
Facebook (personal profile)	38%
Other	10%
Twitter	4%
Soundcloud/Mixcloud	3%
YouTube	2%
ReverbNation	1%

SECTION 5G: The health of the live scene in Edinburgh

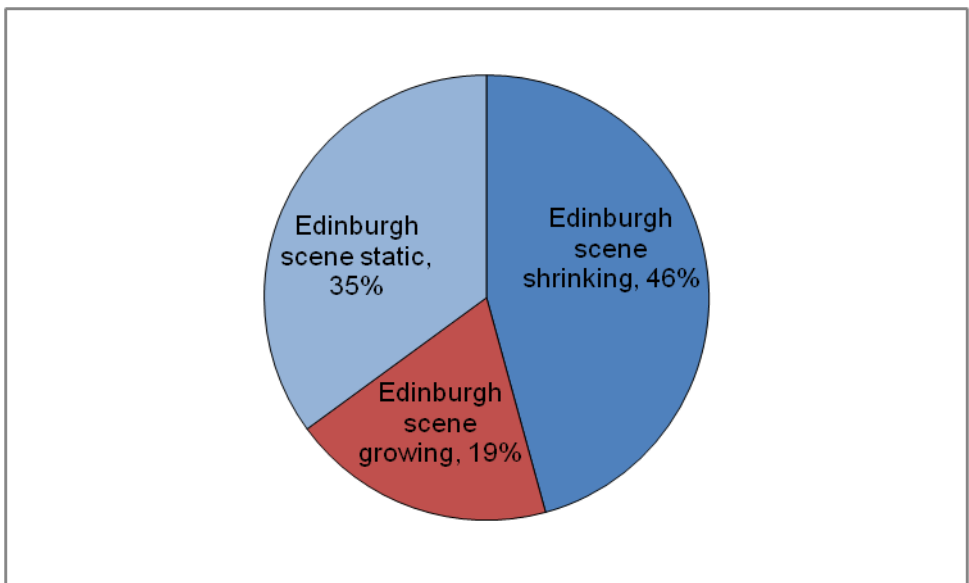
In the last 12 months, has the number of gigs you have played changed?

In the last 12 months, the number of gigs that respondents have performed has stayed the same as the previous year (38%) or decreased (34%).



Do you think that Edinburgh's live music scene is growing, shrinking, or static?

Most respondents believe the overall scene is shrinking (46%) or remaining static (35%).



Issues by which gigs have been affected in the last 12 months

In the last 12 months, 44% of respondents' gigs have been affected by noise restrictions and 34% by parking restrictions.⁹²

Noise restrictions	44%
Parking/loading issues	34%
Health and safety issues	12%
Building/development issues	9%
<i>None of these</i>	41%

Have you, or your band, moved to Edinburgh from a rural area or another city/town for more music opportunities?

The majority of respondents have their main residence in Edinburgh (74%). 19% of respondents (or their band members) have moved to Edinburgh from a rural area or another city/town for more music opportunities, therefore live music is a not insignificant driver of migration into the city.

Yes	19%
No	81%

⁹² We note that accommodations for musicians have been made for musicians as part of the Live Music and Performance Action Plan in Sydney and in Austin, Texas. See:
<http://livemusicoffice.com.au/policies/city-of-sydney-live-music-and-performance-taskforce/>
<http://themusic.com.au/news/all/2013/12/11/sydney-mayor-pushes-live-music-reforms-through-council/>
<https://www.austintexas.gov/page/musician-loading-permits>

SECTION 5H: Qualitative data on how government could improve live music scene in Edinburgh

The question asked in the musician online survey was 'Please use this space to add any thoughts that have about what you think government (city council, Scottish and/or UK) could do to improve the live music scene in Edinburgh or more widely'. The qualitative data listed here is a selection of responses rather than all of the musician survey responses – they have been loosely grouped under broad headings but some fit under more than one heading.

Overview

Promote cheap/free events and groups where musicians can come together. Stop building residences next to thriving music venues which then need to adhere to strict noise policies. Allow musicians to play/busk on the streets without requiring a permit. Promote Edinburgh as a place to come to hear good music. Create a larger venue for the city, and help the smaller ones reach larger audiences. Go to gigs. Talk to people. Get involved.

Noise regulations

Reword the 'audible' part of the noise regulations. A single complainer can stop live music. There is now an 'unplugged' culture developing on the scene to the detriment of the artists

They could make it more difficult for sole complainers to prevent live music happening in venues. Also when someone is buying or renting a property above/beside a music venue they should sign a document accepting that there will be live music played til a certain time of night. These laws are killing our livelihood!

In Edinburgh, specifically, less attention should be paid to that ONE person who just bought a flat/house next to a live music venue and complained about the noise. We've lost quite a few gigs over the last few years due to the heavy-handedness of the 'noise police'. My bands have never received complaints from the public regarding noise, to the best of my knowledge, but we still lose the gig when a venue is sanctioned.

As I'm sure you'll hear, often: the "amplified music", single-complainant etc policies are crippling bands and bars which host gigs. The enforcement of the council's policies is much too brutally inflexible and draconian. Without a more common-sense approach grassroots-level music will die and bars will close; people will be out of work and regular gig-goers will be thwarted and denied entertainment. Not a healthy situation.

Planning legislation

Introduce Agent of Change legislation, require developers to adequately soundproof new builds and redevelopment for residential properties. Amend licensing policy, make more practice/rehearsal space available.

Investment in infrastructure

Invest in venues, and free/cheap rehearsal spaces.⁹³ Address noise restriction laws, and help create hubs where musicians can rehearse and meet other musicians and artists for cross collaborations.

⁹³ The need for developing rehearsal spaces is a key strategic objective outlined by the Desire Lines report. Desire Lines (2015), *Desire Lines: A Call to Action from Edinburgh's Cultural Community*, p.13

There is a tragic lack of infrastructure, notably venues. To have the Queens Hall as your own ONLY mid sized venue is ridiculous. Edinburgh is crying out for a Sage Gateshead type major arts hub with purpose built small, mid and large size spaces. Outside of the Festival Edinburgh's cultural output is frankly VERY poor in comparison to other European capital cities, or cities in general for that matter. Audiences are dwindling for the things that do happen due to the lack of infrastructure, joined up marketing and habit forming programmes that Edinburgh should but does not have. It is also the only capital city in Europe without a music conservatoire. Edinburgh lives off the festivals reputation wise but the truth is a chronic short sighted approach over a very long period has left it frankly bereft of a credible music infrastructure. The first priority must be a purpose built mid sized venue, preferably with multiple spaces of different sizes, with public money support to programme properly, not just the safe, boring acts that currently are the staple of the venues that must break even at all costs. The best case scenario would be a Sage Gateshead/South Bank Centre type complex. Really, to be taken at all seriously, Edinburgh needs this. It seems obvious that the council does not grasp how far the city is falling behind other places. It needs to act decisively now.

It would be good if councils could help venues which have live music. I travel all around the UK for gigs. Most venues require me to take & use my own Pa system. If city venues had their own decent systems with fold back, it might cut the cost of payments to musicians plus the venues could then regulate the amount of volume front of house. . Help with promoting & soundproofing venues would also be extremely helpful. Trying to educate venue owners & musicians would also help where the use of amplifiers is concerned. I also work as a sound engineer in venues & can't believe the lack of understanding the physical capacities of sound that good established working musicians do not understand.

Local government subsidised venue/hub with performance and recording/rehearsal facilities. Also residential space for visiting or touring artists as is often the model in European cities. Thus allowing more opportunities for smaller promoters to attract international acts. Local and up and coming bands then have the chance to appear on the same bill as a more established act, develop professional practice etc.

Promotion by Council

Shout about it more! Market live music in a massive way! Musicians and artists are digging really deep now and live music is more exciting now than it's ever been. Market that.

Pay less attention to tourism. The Edinburgh Festival and Hogmanay celebrations seem to be all the council is interested in. Edinburgh boasts of it's arts festival, but in Glasgow it is a laughing stock. Meanwhile: Glasgow has a vibrant scene which local government and the bar scene support as it brings them income. At a national level: the government needs to consider Universal Basic Income as artists are not business people. Art is more often than not at odds with business and artists should not pander to earn a few quid.

Funding opportunities

Clearer funding opportunities. It's hard to establish what I personally am eligible to apply for.

http://desirelines.scot/DesireLines_booklet_SCREEN.pdf

The use of empty council buildings for this purpose has also been mooted.

<http://www.edinburghnews.scotsman.com/news/empty-council-building-could-become-music-venues-1-3457428>

The Edinburgh 'scene'

I wasn't really aware of much a music scene in Edinburgh. Seriously. There's plenty musicians, no scene.

Great music scene. The council seem to have their periods of giving any and every venue that hosts live music noise complaints. Usually at the height of summer - the busiest time of year.

I think the Council need to be educated on the live music scene in Edinburgh, its history and its present state. It has a duty of care to support the arts in a city which against the odds and almost despite the Council, recently produced a Mercury prize winning band, Young Fathers. Neil Cooper points to ways of supporting the scene as well as the risks it current faces from a disengaged Council at the moment, in his article: <http://livemusicexchange.org/blog/the-only-fun-in-town-neil-cooper/> I think speaking to experts like Neil should be the first step in the city's endeavours to support the arts in Edinburgh.

The Edinburgh music scene is thriving but only because it facilitates this itself. Edinburgh Council in my eyes do very little to help live music . In fact they seem to do everything in their power to hinder it

Transport

Better public transport links later in the night - would result in less people leaving gigs to get the last train/bus.

Free musicians parking permit for load ins and load outs. Especially for rhythm section members. Dedicated and combined live music Edinburgh Facebook / twitter etc pages with tie in from all major venues. Reduce the scapegoating of musicians risk in car insurance. Some of us can't afford the assumed level of higher risk that musicians incur due to the possibility of transporting an 'A' list celebrity, (I mean come on!). Try to maintain an active local musicians list, possibly in conjunction with the MU to make established and available musicians known to any visiting artists, companies, groups etc for use as deps, local work etc.

Minimum wage

Formalisation of the industry to allow a minimum wage to be set. However to reach that point you would need to support the live venues so that they are profitable ventures, we are seeing a trough in the graph for profitability from music in both the recording industry and live music industry. With many in the industry working at a loss for 6 odd years in order to be able to start making a living from music. If there were more opportunities like the Spring Fling events and Big Burns Supper that are held in Dumfries we would see a far better live music scene in Edinburgh, with quality employment for musicians. These events are funded through Creative Scotland and guarantee payment for what the band would expect to make, then if ticket sales go over this amount the band don't access the fund however if they don't reach this quota then the fund pays them the difference. This allows a more varied music scene where creative risks can be taken to the benefit of engaging the audience. These events also provide good advertising and promotions for all the gigs put on by artists as part of their festivals. Jazz Scotland must also be commended for its quality programming which provides a fantastic opportunity for musicians throughout Scotland to get paid gigs and begin to make a livelihood from music. Quality programming in partnership with local venues which benefits the venues so they can employ musicians and values musicians with a living wage, even a minimum wage would be better. Pressure must be put on events like Spa in the City to budget for music. We were paid only £500 for two 7 hour shifts of sets of live music over two days, split between a 6 piece band this is abimal low pay especially when we put hours of

practice time and years of education and effort into writing original songs and refining our craft, let alone the sets for that particular gig. That was privately run, and it just seemed like they didn't understand that they need to pay the musicians. Security, Bar Staff, Catering, Event Organisers and even Soundmen get paid before and often better than musicians. Spa in the City was an event where it was obvious that the real draw of the weekend was to sit out in the sun and hear the live music. Some kind of communication is sent across the private businesses and public sector that puts an impetus on paying musicians fairly and in allotting a larger percentage of the budget for the music. At Spa in the City our band were responsible for bringing in the majority of the crowd who wouldn't have come to see some stalls to sign up for a spa membership with out us. The MU has plenty of information and research in to how much musicians need to have a lasting career and earn a living from music. Thanks for your time.