

MAYOR OF LONDON

**Rescue Plan for
London's Grassroots
Music Venues**

Making progress



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Greater London Authority
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With thanks to
The London Music Board
The Mayor of London's Night
Time Commission

Cover Image: Blood Orange at KOKO, Camden
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Contents

Introduction from the Mayor	4
Executive summary	6
Definition of a grassroots music venue	8
London's grassroots music venues in numbers	10
Map of London's grassroots music venues	13
Putting the Rescue Plan for London's Grassroots Music Venues into practice	19
Our partners	28

Introduction from the Mayor



This report is a major step to rebuilding London's live music scene. I believe music is vital for our city. That's why I've appointed London's first Night Czar. I've also committed to using the Agent of Change principle to protect music venues, clubs and pubs.

Sixteen months have passed since the Rescue Plan for London's Grassroots Music Venues was published. This report offers an update on progress, plus new facts and figures. I hope it gives you the arguments, evidence and inspiration you need to support London's grassroots venues. They add to the vibrancy of our city.

Developers and planners now recognise how important music venues are to local communities. New research also shows just how much grassroots venues bring to London's economy.

In this report, you'll find a new map from the Music Venue Trust. It shows the tide is turning. Fewer grassroots music venues closed in 2016 than any year since 2007. For every closure a new venue opened.

Gig and club going remains a hugely popular activity, and not just in big arenas like The O2.

Every night, nearly 14,000 people go to a gig in a grassroots music venue in London. Omeara has opened at London Bridge and the Sound Lounge will launch soon in Tooting. I'm delighted too that Fabric has reopened and am optimistic for 2017. But we can't rest on our laurels.

The success of the music industry depends on flourishing grassroots music venues. These are the places where stars make their names. Whether it was Elvis Costello at the Half Moon, KT Tunstall at the 12 Bar or Elf Kid at the CLF Art Café, London's grassroots venues have always been the places to find new talent.

Our figures show that London's grassroots venues bring £92m to the economy every year. £44m of that is spent developing and showcasing new musical talent. This is the single biggest spend on upcoming talent in the music industry. By taking a risk on new artists, these venues play a vital part in an industry that is now worth £4.1bn in the UK.

At City Hall, we work to support grassroots music talent. For example, hundreds of young musicians from low income

families get free music lessons through the Mayor's Music Fund. We support London's Music Education Hubs which teach over 180,000 young Londoners every year. Busk In London also helps musicians to develop their talent and earn a living in music.

Music helps make London a dynamic city. Our music scene is second to none and shows the world that #LondonIsOpen to talent. I look forward to working with planners, developers, licensing teams and the music industry to future-proof our music infrastructure. By working with boroughs and artists we can also support and showcase the breadth of music across London.

Finally, I'd like to thank the London Music Board, music industry, councils, media and this city's many music lovers. Your efforts to protect music in London are paying off.

Let's now make London the world's best music city.



Sadiq Khan
Mayor of London

Executive Summary

The Rescue Plan for London's Grassroots Music Venues made six recommendations to stem the tide of closures and help new venues open. They covered: planning; development; business rates; licensing, policing and environmental health; promotion of venues; and music tourism. Here's how we've been doing so far.

1. Planning

Mayor Sadiq Khan has pledged to introduce the Agent of Change principle in the next London Plan. The draft London Plan will be published for consultation this autumn. We are working closely with the London Music Board and Night Time Commission to develop it. New Supplementary Planning Guidance for the night time economy will also be published later in the year.

In April 2016 the Government introduced the Agent of Change principle into Permitted Development Rights (an area of planning law that allows development without requiring planning permission). This is a major step that shows the value of live music venues not just in London but across the country.

2. Development

We have brought developers, councils and the music industry together in a working group to look at how to reverse the 35 per cent loss of music venues. Developers are key to the solution. There is a clear commitment to tackle this issue and create new venues. Now several potential music venues are in development across London. If just a few of these reach fruition, it will be a major boost to London's live music infrastructure.

3. Business Rates

The government is reviewing business rates. They are likely to increase for many businesses in the coming months. This is of concern to businesses across London. It could put a number of grassroots music venues at risk, especially those in the centre. Our research shows grassroots music venues bring £92m to London's economy every year. They also support 2,260 jobs. On average, each venue spends some £500,000 on developing and showcasing new and emerging talent.

London's grassroots venues pay around £2.8m in business rates each year. If business rates

were cut it would be a big boost to venues. It would allow them to invest in upgrading outdated infrastructure. It would mean they could give customers a better experience. Finally, it could help stabilise their businesses.

We're now looking at the costs and benefits of a business rates discount for London's grassroots venues and will report later this year.

4. Licensing, Environmental Health and Policing

The Mayor wants to encourage stronger partnership working between businesses, councils and police licensing teams. This will help to identify problems at an earlier stage and allow solutions to be put in place. It should reduce the need for enforcement action and the closure of venues. The Chair of the Night Time Commission and the Night Czar will work with boroughs, the police and the industry to promote more joined-up working.

5. Promotion

The Rescue Plan for London's Grassroots Music Venues recommended the city should have a Night Czar. In November the Mayor appointed Amy Lamé as London's Night Czar - the first in

the UK. He also extended the work of the Night Time Commission and appointed Philip Kolvin QC as Chair. Music is at the heart of a city's night time culture. Both Amy and Philip will work to ensure that music venues play a central role as London becomes a 24-hour city.

Another recommendation of the rescue plan was to create a London Music Board. This was set up in April 2016. It brings together representatives from the music industry, government, tourism, culture and education. The board oversees how the rescue plan will be put into practice. It also aims to ensure that all Londoners can benefit from living in one of the world's greatest music cities. The board is chaired by the Night Czar.

6. Tourism

We need to do more to promote London's venues and music heritage. Initial research shows that gig listings for grassroots music venues are patchy. Buying tickets often requires knowledge of the music scene that many tourists don't have. Research shows that tourists are looking for authentic experiences and venues off-the-beaten track. London and Partners and the London Music Board are exploring new music tourism schemes to address this issue.

Definition of a grassroots music venue

The Music Venue Trust defines the cultural and social importance of a grassroots music venue by testing its reputation, role and activity against six criteria.

A grassroots music venue displays some or all of these characteristics, dependent upon factors such as location, economic climate, or seasonal variations.

1. The elephant test.

Musicians and audiences in the town, borough or city think that it is the grassroots music venue.

2. Focus on cultural activity as its main purpose.

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

3. A music business, run by music experts.

The focus of the organisation is music. Other services (alcohol, food, merchandise) are secondary or dependent upon music activity.

4. Takes risks with its cultural programme. This risk taking is the ignition system of the engine that is the UK music industry.

It programmes artists that deserve to be heard by audiences. This is done with no expectation of direct financial reward. This loss-making activity benefits the UK music industry.

5. A beacon of music that brings the local night-time economy to life.

Having a grassroots music venue (or venues) inspires towns, boroughs and cities to be musical. In contrast, the absence of one causes a lack of music activity. Such venues attract audiences who help support other parts of the night-time economy like restaurants, pubs, bars, clubs and transport.

6. Plays nicely with others.

Occupies an important role within its local community, provides education and training in 'back-of-house' trades and is open to further networking.

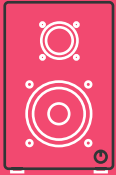
For the full Music Venue Trust definition, with details on economic activity, amenities and infrastructure, see the Rescue Plan for London's Grassroots Music Venues at london.gov.uk/musicvenues



London's grassroots music venues in numbers

94

grassroots music venues currently trading in London



2,260

full time jobs are supported by these venues



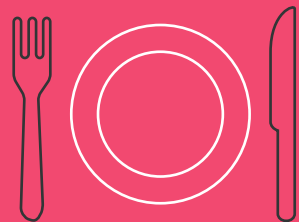
£91.8m

is contributed to London's economy



£44.6m

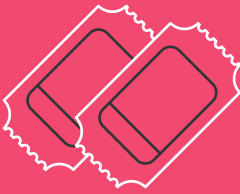
is generated in tax revenue every year



For every £10 spent on tickets to grassroots music venues in London, £17 is spent nearby on food, drink and transport.

13,803

people go to a grassroots music venue in London every night



4.4

nights of music are put on by grassroots venues every week



£34m

worth of tickets are sold every year



£44m

is invested in new and emerging talent every year

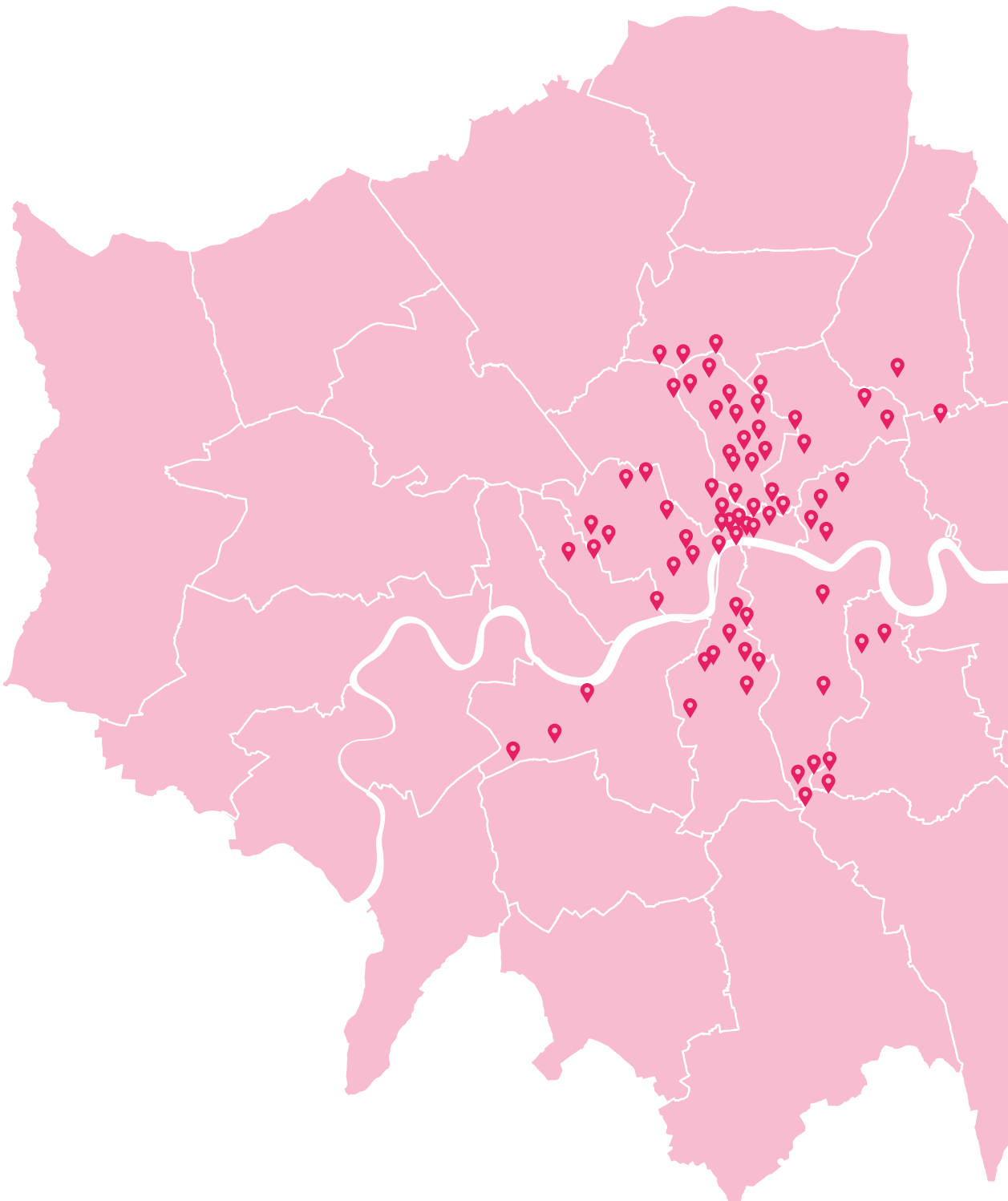


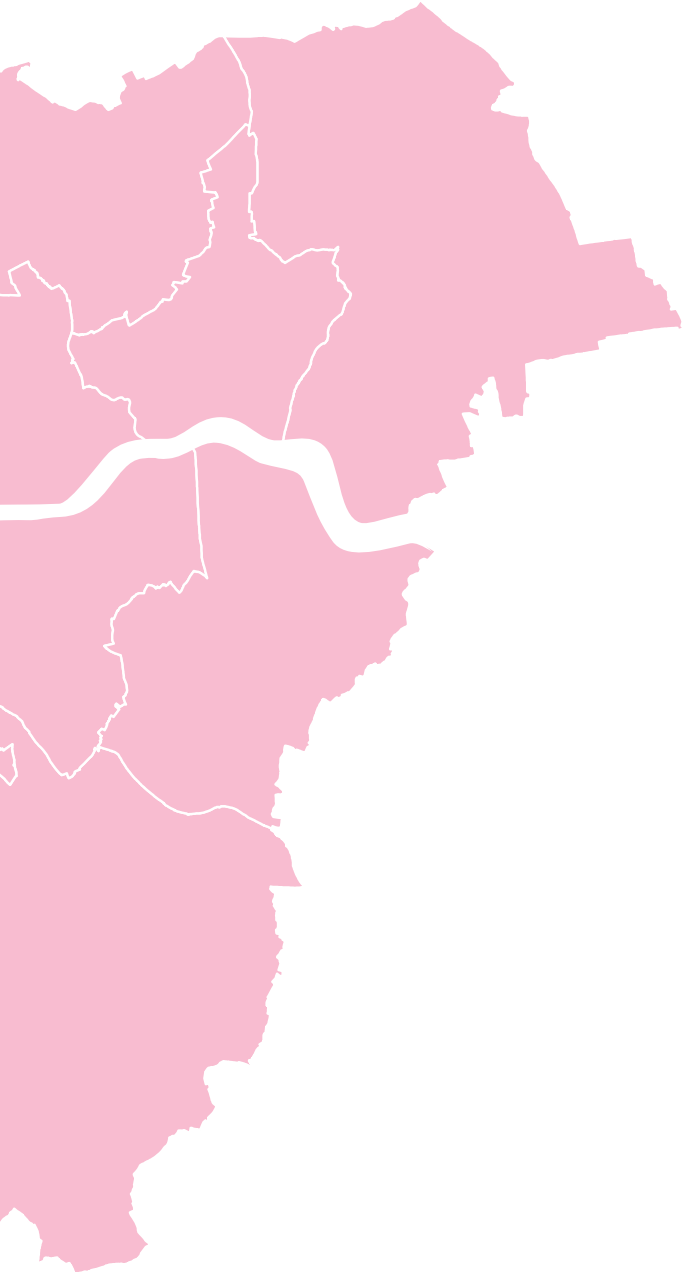
Fewer grassroots music venues closed in London in 2016 than any year since 2007



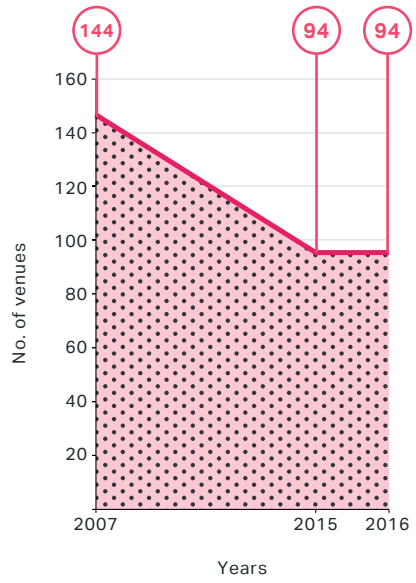
Map of London's grassroots music venues

Grassroots music venues in London that have closed or changed use, 2007 – 2016



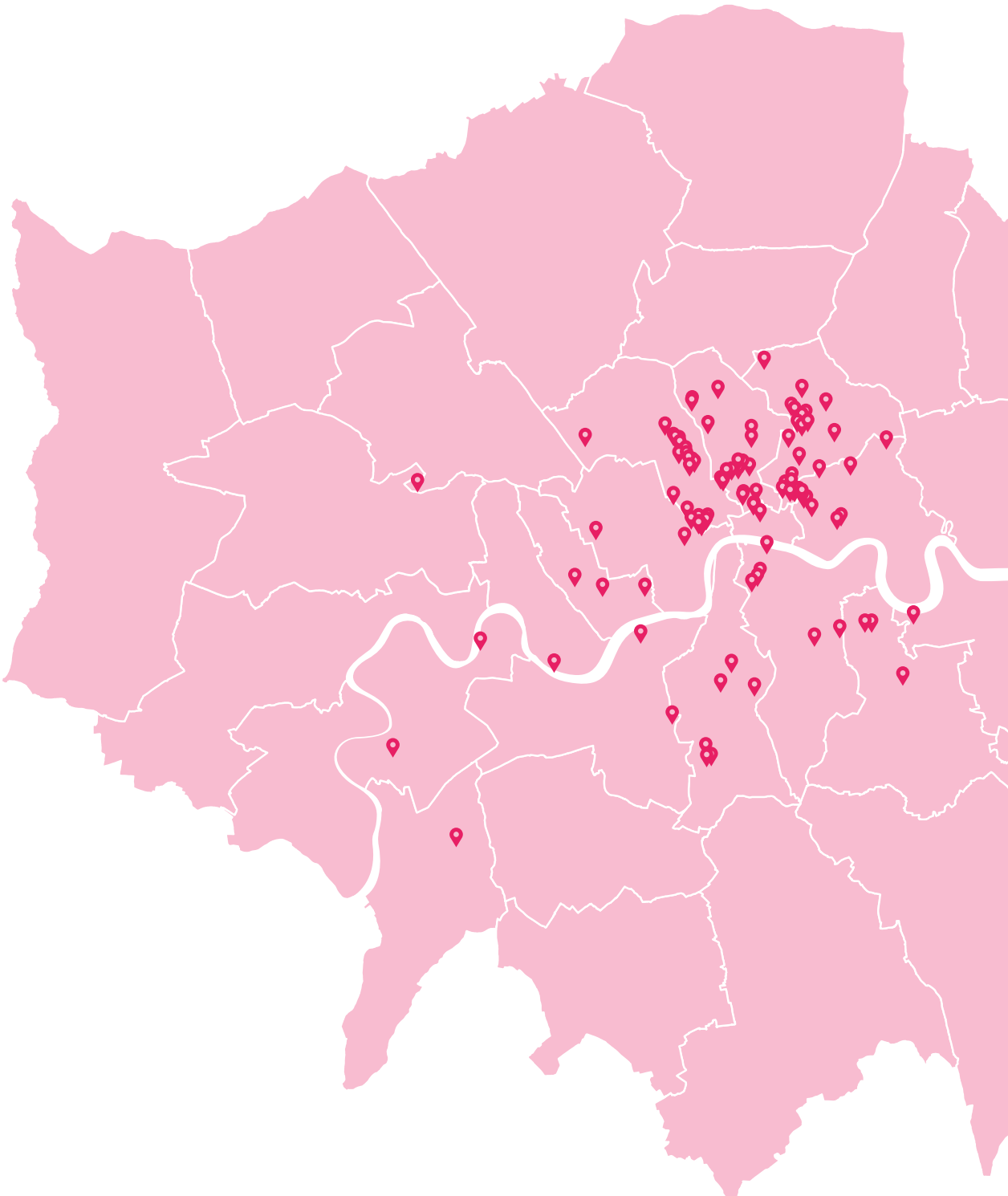


Number of grassroots music venues in London 2007 – 2016



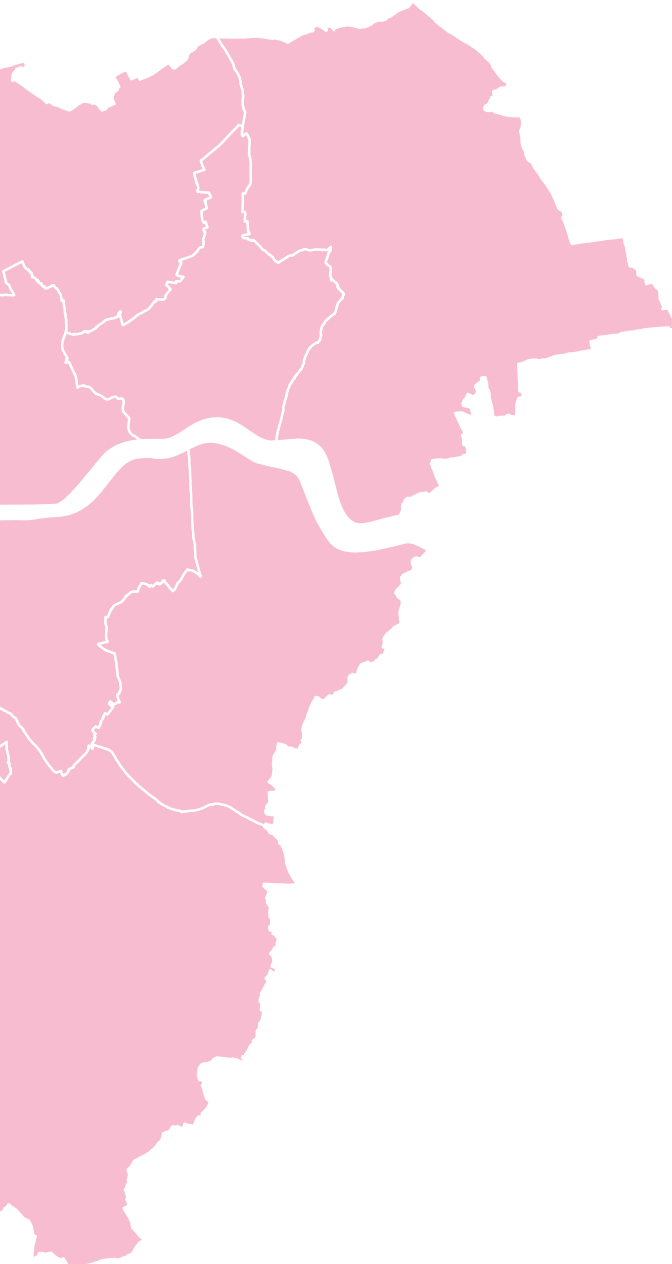
View this map online:
london.gov.uk/musicvenues

Grassroots music venues trading in London in November 2016



 **94**

**Grassroots music
venues trading in London
in November 2016**



View this map online:
london.gov.uk/musicvenues

Methodology

Mapping London's grassroots music venues

The Music Venue Trust sent an in-depth survey to grassroots music venues in London. It asked for information on turnover, employment, music programming and ticketing.

As of November 2016 there were 94 grassroots music venues in London. The figure is an increase on the 88 venues listed in 2015's Rescue Plan for London's Grassroots Music Venues.

This is due to a small number of venues being re-categorised as grassroots music venues in the 2016 re-mapping process. The number of grassroots music venues in London in 2007 has also been revised up from 136 to 144. This doesn't affect the figure for the net loss of music venues which remains at 35 per cent. We were contacted by several people after the Rescue Plan for London's Grassroots Music Venues was published with information about additional venues. We are grateful to everyone who got in touch.

The economic impact of London's grassroots music venues

To look at the economic impact of these venues, Nordicity converted the data on expenditure and turnover gathered by the Music Venue Trust. It was turned into estimates of employment, labour income and gross value added. This was done using the Office for National Statistics' Input-Output Supply and Use tables. Total turnover included revenue from food, drink and ticket sales.

Nordicity estimated the total economic impact of London's grassroots music venues. They included: economic activity in venues (direct economic impact); economic activity generated at London companies that supply goods and services to the venues plus income earned by artists performing at venues (indirect economic impact); and economic activity that happens when artists, and people who work at the venues and supplier companies, spend their wages in London (induced economic impact). Nordicity also estimated the economic impact of audiences buying food and drink outside the venues, immediately before or after a gig (spill-over economic impact).

Read the full reports at:

london.gov.uk/musicvenues

Putting the Rescue Plan for London's Grassroots Music Venues into practice

Recommendation 1: Planning

- 1a** Make specific reference to music venues in London's planning policies.
- 1b** Adopt the Agent of Change principle in London's planning policies.
- 1c** Local authorities should consider using an Article 4 Direction to protect music venues.
- 1d** Make more use of the Asset of Community Value process to protect music venues.

Progress

- Our Supplementary Planning Guidance for town centres and for the Central Activities Zone now makes reference to music venues.
- Since the Rescue Plan was published the government has introduced an example of the Agent of Change principle into UK planning law. New rules introduced in April 2016 mean that councils have to consider the impacts on music venues and other sources of noise when giving approval to convert offices to flats. Developers are encouraged to work with the local council and the music venue to ensure that live music is protected. This is an amendment to permitted development rights in the Town and Country Planning (General Permitted Development) Order 2015.
- The Mayor has pledged to put the Agent of Change principle in the next London Plan. The draft London Plan will make specific reference to music venues. It will be published for consultation later this year and the final plan is due to be adopted in 2019.
- The Mayor is developing Night Time Economy Supplementary Planning Guidance for consultation in 2017.
- Several boroughs have approached City Hall for advice on implementing the Agent of Change principle.
- London Borough of Wandsworth has used an Article 4 Direction to protect 120 of its 177 pubs. It includes all of its grassroots music venues.
- More grassroots music venues are now applying to become Assets of Community Value.

Recommendation 2: Developers

2a Developers should consider using the Deed of Easement of Noise when creating housing near existing music venues.

2b Developers should work with planning authorities to create high quality new grassroots venues and set-up 'Music Zones' for grassroots music activity.

Progress

- We have advised a number of local councils and developers on the Deed of Easement of Noise and how it could be used in their developments.
- The London Music Board is examining zoning policies in other cities around the world. Early evidence suggests it can be restrictive to music venues.
- We have run a number of working groups with property developers.
- Thirty property developers, architects and planners attended Sound Diplomacy's new Sound Development Conference in September 2016.
- Developers are keen to support existing grassroots venues and create new ones. The London Music Board is offering developers and venue operators guidance on creating new venues.

What is the Agent of Change principle?

This principle puts the onus for noise management on the Agent of Change. That means the incoming individual or business. This could be a resident moving into a flat near a music venue. It could also be a developer building a new music venue near a residential building. It has already been adopted in parts of Australia and the US and is working well.

In Southwark, planning consent was recently given for flats near a music venue. As part of the Section 106 Agreement, the developer must make prospective residents aware of the nearby music venue before they decide to buy or rent. Other measures that help include building design and soundproofing. All have been designed to ensure that residential and music uses can co-exist.

For the Agent of Change principle to work it must be put into practice in planning, licensing and noise policy. This will ensure that the principle remains in operation for the lifespan of a building, not just when it is first built.

Recommendation 3: Business rates

- 3a** Local authorities should be encouraged to implement urgent relief on business rates for grassroots music venues.
- 3b** The government should investigate offering full relief from business rates for grassroots music venues. If action is taken quickly this could feed into the review of business rates that is now underway and is set to report back by Budget 2016.
- London's grassroots music venues invest £44m each year in talent development through their spend on musicians and bands and production of live gigs.
 - Further research is underway to identify how a business rate relief could help grassroots venues, support jobs and benefit local economies.

Progress

- This report sets out the economic impact of grassroots music venues and how they contribute to London's economy. It is the first study of its kind and will inform the case for a business rate relief.
- The overall contribution of grassroots music venues to London's economy includes £91.8m in gross value added, 2,260 full time equivalent jobs and tax revenue of £44.6m to all levels of government.

Recommendation 4: Borough licensing, environmental health and policing

4a Local authorities and police should try and cut excessive licensing requirements, increase audience capacity and simplify their relationship with grassroots music venues.

4b Local authorities should adopt the Agent of Change principle in the way they deal with noise complaints.

Progress

- The Mayor's Night Time Commission, chaired by leading licensing lawyer Philip Kolvin QC, will look at the issues surrounding licensing, policing and noise.
- The Mayor has contributed to a review by the House of Lords Licensing Act Committee. The Mayor supports licensing at local level and agrees that licensing powers should lie within local councils. The Mayor believes licensing could play an important place-making role by helping to create vibrant and successful neighbourhoods.
- The Night Time Commission, can support local councils by providing: a strategic vision for the night time economy as a whole; leadership and education in the planning of night time economies; and London-wide programmes where appropriate.
- We've commissioned the University of Westminster to analyse the value of the night time economy in four London boroughs. This research also looks in detail at two night-life locations and the opportunities and challenges in both areas. It will be published later this year.
- A number of grassroots music venues are currently applying to increase their audience capacity.

Recommendation 5: Supporting music in London

- 5a** Create a Music Development Board to implement these recommendations.
- 5b** Appoint a Night Mayor for London.
- 5c** The Music Development Board should set a target for the minimum number of grassroots venues across London and establish a number of 'Music Zones'.

Progress

- The London Music Board has been set up to oversee how the Rescue Plan for London's Grassroots Music Venues is put into practice. Five meetings have taken place plus working groups with tourism agencies, promoters, developers and local authorities.
- The Mayor has appointed writer, broadcaster and club night promoter Amy Lamé as London's first Night Czar. He has also appointed leading licensing lawyer Philip Kolvin QC as Chair of the Mayor's Night Time Commission.
- The Night Czar will chair the London Music Board.
- UK Music, the Musicians' Union and the Music Venue Trust were central to the Agent of Change principle being added into planning law.
- UK Music's annual music tourism report is informing the music tourism initiatives that are being developed by London & Partners.
- The Musicians' Union have carried out research that highlights the cost of parking fines for musicians. 42 per cent of musicians surveyed had received fines of up to £200 when moving their equipment to and from venues. The Musicians' Union are looking to pilot special loading bay access for musicians in the coming year.
- The London Music Board is looking into zoning and target-based policies in other cities around the world. Early evidence suggests zoning and target setting can work against music venues.
- The Mayor is committed to supporting musical talent through Busk in London and International Busking Day. These pioneering initiatives see London leading the world in street performance and artist development.

Recommendation 6: Promoting music in London

6a Tourism agencies, the music industry and London government should invest in a campaign to promote London's grassroots music venues and their heritage.

Progress

- Music tourism generated almost £1bn for the London economy in 2015 according to UK Music's Wish You Were Here report.
- London & Partners, the Mayor's official promotional agency, is increasing the music content of the Visit London website and app. This includes launching London area guides that include new music experiences for tourists.
- The Mayor, London & Partners and the London Music Board are looking into new initiatives to capitalise on the popularity of music tourism. They will focus on better promotion of London's grassroots music venues and revealing the capital's music heritage.
- The Mayor and Heritage Lottery Fund supported Punk London. This year-long programme celebrated forty years of punk culture in 2016. It included over 60 events at places like The British Library, Museum of London, Photographers' Gallery and the 100 Club.



Our partners

The London Music Board

Amy Lamé,
Night Czar (Chair)

Paul Broadhurst,
Head of Music and
Night Time Economy
Greater London Authority

Alex Bruford,
Chief Executive, ATC Live

Julie Chappell,
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Clare Coghill,
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Mark Davyd,
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Music Venue Trust

Jo Dipple,
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Attitude is Everything

Auro Foxcroft,
Chief Executive,
Village Underground

Stuart Galbraith,
Chief Executive, Kilimanjaro Live

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Strategic Director,
Music Venue Trust

Music Venue Trust

The Music Venue Trust is a registered charity. It protects the future of live music in the UK by supporting grassroots music venues. It raises awareness of the vital cultural, economic and community roles that grassroots venues play. The trust also supports existing venues, making them more efficient and giving performers and audiences a better experience.

Nordicity

Nordicity is an international consultancy for the arts, cultural and creative sectors. It provides research and evaluation, develops strategy and policy and carries out economic analysis.

Sound Diplomacy

Sound Diplomacy is the leading global advisor on music cities and music market development.



