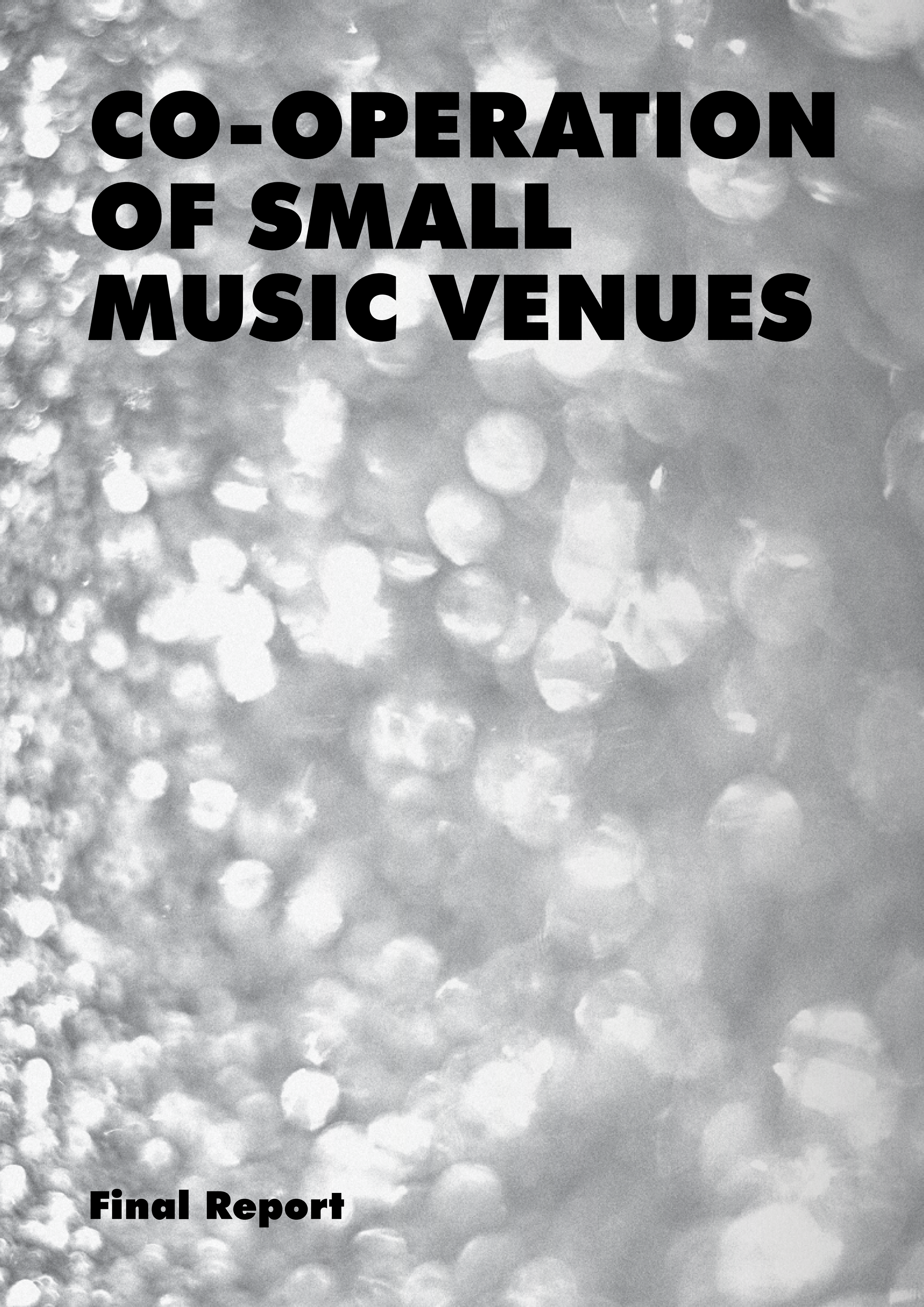
CO-OPERATION OF SMALL MUSIC VENUES



Final Report

LIST OF CONTENTS

INTRODUCTION

Welcome to the final report of the *Co-operation of small music venues* project which was an initiative of Music Estonia and their partners, LiveFIN, Kultuuriklubi Tempel (Pärnu) and Bar Loose (Helsinki) and was funded by Creative Europe's Music Moves Europe.

I would like to begin by thanking all those involved in helping to make this report happen. So, many thanks to Music Estonia for submitting the original bid and LiveFIN, Bar Loose and Kultuuriklubi Tempel for supporting the work. Many thanks also to all the other venues which participated and helped with disseminating the audience and musician surveys and to all those who participated in those surveys.

I would also particularly like to thank the researchers who conducted the bulk of the research – Marge Sassi and Egge Kulbok-Lattik (Estonia) and Maarit Kinnunen and Reeta Pankka (Finland). A special mention must also be made of Ingrid Stroom of Music Estonia, who joined the organisation after the start of this project and put in a great deal of work in to ensuring that it was concluded. This report would not have been possible without these people and I am in their debt as, indeed, are the musical communities of Estonia and Finland. The amount of information the researchers gathered was far in excess of what can reasonably be accommodated here. However, it forms a rich data base upon which to both build future research and help live music venues.

As Research Supervisor for the project and author of this final report, I am happy to take responsibility for it. While many colleagues commented on drafts, what you have before you are the conclusions of my own analysis of the material which my colleagues gathered. I therefore acknowledge that any omissions, errors and oversights are mine alone. The main purpose of this report is to inform the future actions of the venues and their representative organisations and I hope that it will do that.

I look forward to hearing your comments and to working with Music Estonia and LiveFIN in order to implement the findings here and to support the live music industries in both countries.

Martin Cloonan
April 2022

CONTEXT: THE RISE OF LIVE MUSIC

Prior to the onset of the Covid 19 pandemic in March 2020, live music was enjoying something of a renaissance across the western world. One result of this had been a realignment of power within the music industries (Williamson and Cloonan 2007). Where once the recording sector had been culturally and economically dominant, from around 2008 the live music sector became of greater commercial importance. Economic reports such as UK Music's annual *Measuring Music* publication consistently showed that live music had become of greater economic value than recorded music – and that the gap in value between them was growing year on year. Within the live sector major promotions companies such as Live Nation and AEG were striding the globe and undertaking a range of activities including promoting shows and owning and/or managing a range of venues. Meanwhile whereas major artists had once toured in order to sell records, they now made records in order to promote their live shows.

That, at least was the rhetoric that making the headlines. However, behind those headlines the reality was more complex. If major acts such as the Rolling Stones, Lady Gaga and Taylor Swift were seemingly able to sell more and more tickets at higher and higher prices, then at the lower end grassroots music venues across the western world were facing a number of problems which often threatened their very existence. These included processes of gentrification which brought them new neighbours who often complained about noise emitted by venues, rising rents in city centres, local bylaws and unsympathetic local politicians. Instances of such problems were found in places such as London (Mayor of London 2015, 2017), Melbourne (Homan *et al* 2015) and Sydney (Cloonan 2016a, 2016b, 2018). Closer to home, problems were found for venues in Helsinki prior to the onset of Covid (Hätinen 2019, Malin 2019).

Meanwhile at least four other things are important contextual factors. The first is that the live music sector began to organise itself. Indeed this report is evidence of that. Its key partners – Live Music Estonia and LiveFIN – were themselves only established in 2019 and 2017[1] respectively. Similar organisations within the Nordic countries such as Svensk Live (founded 2017) and Dansk Live (founded 2011) are also recent phenomena.[2] Elsewhere the UK's Music Venue Trust (https://musicvenustrust.com, established 2014) has become an increasingly influential lobbying body and in Australia, the establishment of a federally-funded Live Music Office (https://livemusicoffice.com.au) in 2013 has seen a flurry of activities including numerous reports and local initiatives. In Europe the Live DMA organisation (www.live-dma.eu/) was formed in 2012 to support the work of live music associations and its members include both Live Music Estonia and LiveFIN. In sum, across the developed world the live music sector has begun to mobilise as an industry and undertake a great deal of political activity. Importantly this has included lobbying government to adopt policies which help to facilitate the provision of live music.

The second key factor was that the academic world was also turning its attention to live music. The origins of this can be traced back to a 2003 report from Scotland (Williamson *et al* 2003). At that time it was routinely assumed that "the music industry" meant the recording industry. However, the Scottish report found that while the major recording companies were largely absent from the country, a great deal of musical activity was still present. Importantly, the main monetisation of such activity was found in the live music sector. Intrigued by their findings, two of the report's authors (including the author of this report) applied for funding which was to lead to a three-year research project hosted by the universities of Edinburgh and Glasgow on this history and current working of the UK's live music industry. This resulted in both a number of outputs - including a three part history of the UK's live music industry (Frith *et al* 2013, 2019 and 2021) - and the establishment of Live Music Exchange, an online hub for information exchange on the live music sector (www.livemusicexchange.org).

Academia has since witnessed something of a boom in research around live music. There have been attempts to theorise the sociology of live music events (Holt 2020) and the development of concepts such as ecology (Behr et al 2016), scenes (Straw 1991), networks (Crossley 2019) and forms of capital (Bourdieu 1986) which have sometimes attempted to explain the social organisation of live music. While beyond the scope of this report, such theorisations can help venues in their attempts to examine their roles within the greater live music ecology.

The third factor is the rise of music industries consultancies. This has been allied to the notion of a Music City (Ballico and Watson 2020, Cloonan 2022), wherein much attention is paid to is the state of local live music. At the forefront of this movement has been Sound Diplomacy (www.sounddiplomacy.com/), whose pioneering work has sought to illustrate the sorts of policies cities should develop in order to get the fullest cultural and economic value from live music. Importantly it is live, rather than recorded, music which is at the centre of the increasingly influential Music City paradigm.

The final factor, which cannot be ignored, is, of course, the Covid 19 pandemic. This is again something about which volumes can, have and will be written. For now it is enough to note that the original bid from which this report flows from was designed and submitted well before the pandemic took hold. In many ways that bid was the product of another world. However, we modified our methodology in the light of Covid by including questions to venues on it and we include some reflections about it as part of this report.[3] It is to our methods that this report now turns.

[1] LiveFIN was preceded by the Finnish Rock Clubs Association, which was founded in 2010.

[2] Both have precursor organisations. In Norway the Norske Konsetarrangører was founded in 1982.

[3] For a wider view of the effect of Covid on live music see Live DMA (2021).

METHODOLOGY

In line with the application upon which this report is based, a mixed methods approach was adopted. The research concentrated on the perceptions of the venues which are the focus of the report and were the inspiration for the original bid. These venues were visited by our researchers, with a series of questions being asked and questionnaires being completed. Venues were also asked to disseminate a set of different questionnaires to audiences and musicians. The purpose of this was to gather wider perceptions about what musicians and audiences value about live music in general and within the case study venues in particular, thus providing greater insight into the environments within which the venues operate.

All of the questionnaires were based on those asked during the UK Live Music Census (Webster *et al* 2018) - on which the author was Co-Investigator - with a number of modifications to allow for local specificity and for the inclusion of questions relating to the Covid 19 pandemic. The following venues were interviewed as part of the project:

Estonia: Sveta Baar (Tallinn), Philly Joe's Jazz Club (Tallinn), Genialistide Klubi (Tartu) and Kultuuriklubi Tempel (Pärnu).

Finland: G Livelab Helsinki, Bar Loose (Helsinki), Torvi and Tirra (Lahti)[4], 45 Special (Oulu) and Maanalainen (Tampere).

These can be represented in tabular form as follows:

Name	**City**	**Year established**	**Main genres**	**Capacity**
45 Special	Oulu	1990	Indie	300
G Livelab Helsinki	Helsinki	2016	Varied	200
Maanalainen	Tampere	2017	Punk, rock	60
Torvi and Tirra	Lahti	1966	Varied	130 and 140
Bar Loose	Helsinki	2002 (in current location since 2007)	Punk, indie, metal, rock, DJs	200
Sveta Baar	Tallinn	2018	Alternative music	350
Philly Joe's Jazz Club	Tallinn	2014	Jazz	120
Genialistide Klubi	Tartu	Year established	Varied	350
Kultuuriklubi Tempel	Pärnu	2016	Varied	300 (in previous venue)

Table 1: Project venues

The report now turns to our findings.

[4] This venue replaced Henry's Pub in Kuopio which was originally scheduled to be part of the project but went out of business during the research.

FINDINGS FROM ESTONIA: VENUES

Visits to interview Estonian venues were undertaken in October and November 2021, with audience and musician questionnaires being distributed thereafter and compiled in November and December. All of the Estonian venues featured here have been active for more than three years and in two cases for more than six years. All are independent companies and not part of chains. The main activity of all the venues is the programming of music events. In connection to this, venues reported hosting a range of musical activities including bands, duos and solo artists playing original music, jam sessions, open-mic events and DJ events. They also reported undertaking a range of activities which benefitted the local music scene such as providing a performance space for new artists, a space for posters and flyers for events at other venues, rental rooms for non-music activities, providing opportunities for both volunteer work and for internships. Meanwhile a range of issues emerged from our interviews with venues including the following – venues being community resources, being more than music venues, the pride which venues exhibited, issues around programming, current issues facing the venue, future plans, concerns around noise, government support and responses to the Covid 19 pandemic.

The Estonian venues clearly saw themselves as *community resources* in various ways. For example, while at the time of the visit it was without a venue space, in Pärnu Kultuuriklubi Tempel reported that its former building used to be a meeting place for the community, containing a band room and a rehearsal room within the same building. Informally, it had taken on the role of being something akin to a local youth centre, offering young people a cultural education with a specialisation in music. Such was their attachment to the venue that it said that 'young people do not want to go home from here'. In Tallinn Sveta Baar spoke of being a place for 'admirers of alternative music', with a strong connection with the LGBTQ community (which it aimed to be a safe space for). It also spoke of being a space for the underdog and for people who might see themselves as being outsiders and beyond "normal" society. Similarly in Tartu, Genialistide Klubi (which was founded by the band Genialistid) spoke of being 'a club of special and open people' which wanted to attract 'city dwellers in all age-groups and young people interested in culture, (foreign) students, friends of theatre and music and the local LGBTQ community'. Philly Joe's Jazz Club described itself as 'the only jazz club for professional musicians in Estonia'. It aspires to be an 'Estonian jazz music incubator' which brings musicians and audiences together 'in a setting appropriate for jazz'. While this genre-based approach might be seen as having a more specialist focus than some of the other venues, Philly Joe's also spoke of wanting to 'support the rhythm music scene in general' and of being 'to be an interdisciplinary umbrella for all creative people'. Thus, overall the venues sought to be community resources in the form of being welcoming spaces which frequently catered for marginalised groups and/or marginalised forms of music.

It was also clear that, as is common in many places, our Estonian venues are *not just music venues*.[5] Most offer bar/restaurant facilities outside of gig times as well as other facilities such as a gallery, meeting rooms and other rental spaces. For example, Sveta Baar is a bar during the day and also reported hosting movies, dance shows, theatre performances, art exhibitions, workshops (such as tattooing and drawing), and book and handicrafts presentations. Kultuuriklubi

Tempel had staged poetry evenings, quizzes, travelling story exchanges, multimedia events, dance performances and conferences, as well as starting a DJ school. Perhaps the most diverse was Genialistide Klubi which described itself as a subcultural space and 'a meeting place where theatre, music, cinema and joy are intertwined'. In addition to live music performances, it reported regularly hosting other performances, making recordings of guest performances for podcasts, stand-up comedy, improvised theatre, language courses, expert lectures, workshops, and hosting parties. All this was aided by the fact that the venue shared the same building as Must Kast (Theatre Black Box) and the bar MÖKU. In Tallinn in addition to its range of music activities, Philly Joe's Jazz Club also hosted comedy and discussions with city politicians.

The Estonian venues clearly saw themselves as community resources in various ways.

Venues also exhibited *pride in their work*. For example Philly Joe's Jazz Club pointed to the partners it had worked with including the Estonian Jazz Association, the Jazzkaar Festival, the Estonian Music and Theater Academy, Georg Ots Tallinn Music School, students from Tallinn music schools and with the Viljandi Culture Academy of the University of Tartu, whose performances took place in the club. Prior to Covid, in five and a half years it had hosted star artists from Estonia and across the world, with over 500 music events, including concerts, master classes, workshops and music cinema. In 2016, it was presented with the Jazz Promoter Award from the Estonian Jazz Union in recognition of its restoration of the jazz club tradition in Tallinn. Sveta Baar was pleased to have won the concert venue of the year award in 2019 at the Estonian Music Industry Awards, while Tempel had won an inclusive budget competition of Pärnu County, voted on by local residents. It was proud of having had an impact on the local music eco-system, having acted as a starting place for young musicians and having established a good reputation on the local scene based on a DIY philosophy. It took further pride in having attracted artists from Russia and the Baltic countries to play at the venue. Viewing itself as the guardian of the creative and innovative atmosphere within Tartu, Genialistide Klubi stressed that it serves as a breeding ground for live music and a place which discovers young talents, as well as providing party, cultural and educational facilities to the community.

Venues reported that they provided a range of employment opportunities, which in some venues increased during live music events.

All the venues viewed *programming*, as their main activity and raised a number of issues in connection to this, especially with regard to the rhythm of the live music year. Kultuuriklubi Tempel noted that the live music world was very seasonal, one result of which was that it had developed a collective leave scheme which enabled staff to take the same period off simultaneously and close the office. In addition, its summer programme was more consciously geared towards electronic (recorded) music rather than live concerts, as many bands were playing festivals rather than at indoor venues. It also noted that it was important to have the capacity to organise outdoors events in the summer, again illustrating the seasonal nature of live music promotion. Similarly, Sveta Baar reported that while it was full of music at the weekend, during the week it tended to host other sorts of events. This was also true of Genialistide Klubi, which had assorted events during the week, but mainly focused on music at the weekends. Its overall programme was aimed at attracting a wide audience and it noted the importance of retaining audiences. Philly Joe's Jazz Club offered a nightly music programme including guest performances, gigs organized by the Estonian Jazz Association and jam sessions of jazz, blues, funk and soul. It reported good attendances for all these, with weekends and gigs by international artists providing the biggest audiences. Overall, it was clear that the provision of live music was skewed towards the weekends, with venues hosting a wide range of other activities, which generally took place on weekdays.

Venues reported a number of *current issues* facing them which can be categorised as falling in to two broad categories - ones largely germane to the venue itself and others which had a more general prevalence. As it had not been able to renew its lease following the onset of Covid – and thus was without a current home - Kultuuriklubi Tempel was obviously the venue with the most immediate problem – that of actually *being* a venue. This obviously jeopardises its future and it is clear that until it can secure premises - ideally with a terrace to allow more activities in the summer - it has a very insecure future. It reported that it was not able to garner financial support from local government for its activities as it is perceived as being a commercial rock club and therefore not a suitable recipient of public funding. However, it has received help from local government in its attempts to find a new space. Sveta Baar reported that it was facing problems because of its current maximum capacity is 350 which is not enough to meet demand, especially if any Covid restrictions entailed working at less than full capacity. It was seeking to acquire access to adjoining spaces, although this ultimately failed. It also reported exhaustion due to constantly having full houses in 2019. So busy was the venue that it had had little time to analyse current trends and plan for the future. This might result in it simply carrying on as it had been in the full awareness that its current audience is likely to keep coming.

If these were issues which affected particular venues, then more general challenges were raised by Genialistide Klubi which reported facing problems with night noise, the effects of Covid 19 and the need to undertake repairs. The latter included wanting to renovate the building so that it could make its programme more family friendly and accessible to people with disabilities via the provision of better facilities (such as improved toilet rooms).

Thanks to us, people do not have to move to Tallinn.

The *economic impact* of venues was another important factor. For example, venues reported that they provided a range of employment opportunities, which in some venues increased during live music events. Sales were obviously affected by the provision of live music and overall venues reported that in 2019 50% of the sales of drinks and food were at events related to live music. Two venues reported selling more alcohol during gigs, another said it was less, while the final one, Philly Joes Jazz Club, only opens as a venue and so is not able to make comparisons.

We are not a company in the classical sense — rather a group of friends and family, we live our lives. We are not divided on who does what — the tasks are not divided. The main thing is to be cool and everyone will enjoy it.

Our Estonian venues also had a number of ideas for *future development*, some of which involved calling for *changes in state support*. Speaking generally, Sveta Baar called for more state support for musicians beginning their musical careers, making more music courses available to more people via the state provision of funding and developing export schemes to help take Estonian music to the world. Genialistide Klubi and Philly Joe's Jazz Club both suggested that lowering rates of VAT on concert tickets would help to support sector's development. Genialistide Klubi also suggested adopting "The Icelandic model" wherein the national state offers programming support for live music clubs and halls at national level for the exchange of foreign artists with other countries. Kultuuriklubi Tempel simply noted the need to establish constructive relations with local government. More broadly, venues reported that between 10 and 30% of their income came from public funding, mainly from local government and for various purposes.
Sveta Baar wanted the authorities to tackle - or at least initiate a discussion of - what it saw as the greatest problem – *noise*. It was noted that here there is often a conflict between (existing) venues and property developers. Sveta argued that solutions should be found so venues did not have to close their doors following complaints about noise, suggesting that there should be public funding for the installation of sound isolating which could ensure that the sound would not disturb people in new property developments. Genialistide Klubi also drew attention to the problem of noise. This problem has been seen around the world and it seems that Estonian venues would benefit from a discussion of the Agent of Change principle,[6] which seeks to help venues mitigate noise issues.

Genialistide Klubi also saw some potential for development in the public sector. It is committed to participating in a number of projects associated with Tartu's status as Capital of Culture in 2024 and to completing the Tartu Nightlife Strategy document which had been worked out by the city government of Tartu, but had been stopped because of Covid. In general venues thought that the state could help to cover fixed costs such as rents and utility bills, while also providing support for variable costs such as the staging of gigs by foreign musicians.[7]

As a cultural, educational organisation and as a party place we stand for the creative and innovative atmosphere in Tartu, we offer an open gathering place for the city community.

Looking at the situation before the pandemic and comparing 2019 to 2018, three of the four Estonian venues reported that the average number of visitors increased over these two years, while the other reported a standstill. Both Kultuuriklubi Tempel and Genialistide Klubi reported that they had been attracting new audiences in 2019. Tempel reported that 'In 2019, our interior was finally completed and everyone was satisfied with it - the number of visitors increased'. Whilst venues gave various reasons for the expansion of audience numbers, the two most cited reasons were presenting a more interesting programme (including in one case having more shows by international artists) and potential audiences having a growing awareness of the venue. Another reason cited by one venue was that it had made some technical changes within the building which allowed it to change over more quickly between shows and thus increased the amount of shows it was able to stage on any night. Venues were presented with a range of issues which may have been problematic *before* the pandemic including licensing issues, increased competition, rising costs etc. Of the various issues presented to them, only noise and possible decreasing audiences were cited by venues as major problems. Philly Joe's Jazz Club also reported a concern that some younger people were not attending concerts as often as previous generations, something which caused it some concerns as a venue which sought to be family friendly. However overall the evidence gathered here did not suggest the presence of widespread major problems prior to the onset of Covid.

We play only vinyls, give the musicians total freedom and coddle our guests all-out. That's what a true jazz club is.

Two of the venues reported that state support was good during the pandemic, while the other two preferred not to comment. The main aspects that affected live music events during Covid were said to be the following: the costs related to artists' fees (which increased as some were in heavy demand), growing competition between concert venues and organisers, and growing staff costs. Perhaps the most interesting example to come out of Covid which was mentioned by a venue, was Philly Joe's innovative online collection of shows which is available at phillyjoes.tv and which was a direct response to the fact that gigs could not take place at various points and provided an online way of doing so.

Venues reported that they had received support during Covid from local authorities, the Ministry of Culture (including support for particular concerts) and the Unemployment Insurance Fund Salary Support. When asked what sort of government help they wanted to assist them in recovering from the effects of the pandemic, one venue mentioned help with reconstructing its building to accommodate the new conditions and another wanted help in changing its ventilation system. Venues also called for help in reducing electricity and heating costs, as well as for investing in environmentally friendlier practices such as the use of LED lighting.

Issues relating to *disability and equalities* were also addressed by venues. While some venues had disabled access and toilets and made provision for disabled customers (such as providing free tickets to carers), none reported having its own disability training. Philly Joe's Jazz Club is only accessible via a long flight of stairs which descend in to the venue and currently lacks suitable disabled access, meaning that those in wheelchairs have to be carried in. In addition while some venues were aware of issues of sexual harassment within venues, in others it had less of a profile. As small businesses, venues may not always be in the best position to provide equalities training and here it may be that venues could both collaborate and work with government on a number of equalities issues including disabled access and sexual harassment at venues.

Venues were also asked for other things which they wished to be highlighted and we were told the following:

Kultuuriklubi Tempel (Pärnu):

'Many young people have volunteered for us, we do not need to disseminate any job advertisements'
'Thanks to us, people do not have to move to Tallinn'

'In 2019, we reached by new target groups via organizing dance music events'

'Our CEO is an opinion leader in local community'

Sveta Baar (Tallinn):

'We are not a company in the classical sense - rather a group of friends and family, we live our lives. We are not divided on who does what - the tasks are not divided. The main thing is to be cool and everyone will enjoy it. '

'We have had interns through Music Estonia. We always have people who help in good faith'.

'We have a solid impact on the local live music ecosystem as a breeding ground for young musicians'

Genialistide Klubi (Tartu):

'We are a growth platform for live music by helping to discover young talents. Both the presentation of new artists and the provision of a venue for the touring bands - we have a good possibilities to offer – and the artists are coming.'

'As a cultural, educational organisation and as a party place we stand for the creative and innovative atmosphere in Tartu, we offer an open gathering place for the city community'.

'We are open-minded. There are ideas. There is tolerance. There is openness. You too can be in the club!'

Philly Joe's Jazz Club (Tallinn):

'(We are) a place for jazz musicians to present new music albums and creations, a meeting place for performers, a meeting place for young musicians and experienced musicians, etc.´

'We play only vinyls, give the musicians total freedom and coddle our guests all-out. That's what a true jazz club is'.

'Philly Joe's ran a crowdfunding campaign to purchase broadcasting equipment and as a result established Philly Joe's TV. With the help of Phillyjoes.tv, an archive of jazz music with wider cultural historical value is being created (for instance recorded musicians Tõnu Naissoo, Jaan Sooäär, Robert Jürjendal, etc.).

'Another innovation used by Philly Joe's is Patreon funding platform, which allows to support musicians and creators (artists, actors, writers, etc). Everyone can become a patron, sponsor and support their favourite artists with a monthly payment'.

Expectations for the project

Venues were also asked what they wanted from this report and raised the following points:

- Finding new ways of moving artists between venues
- Sharing problems and successes with other colleagues
- Learning how things are done in Finland
- Making new connections
- Gaining experience of participating in this type of research

Commentary

Musicians showed both the customary diverse range of ways in which income can be derived from music and, within this, the dominance of live music as a source of income.

The Estonian venues showed clearly that they are community resources which serve both audiences and industries which are wider than those just of music. They illustrated the need to balance a spirit of independence (all are independently owned) with a need to keep a range of stakeholders and (potential) collaborators – such as audiences, musicians, co-tenants, local politicians etc – happy. They also all rely on extra musical activities to make ends meet, with the provision of bar and restaurant activities being particularly important here. In to this potentially volatile mix came Covid 19 and, of necessity, (new) relations with government at various levels. In the latter case, issues focused on both regulation (such as noise) and support (such as helping new artists and financial aid with international programming). While serving their *local* communities, venues also demonstrated a spirit of internationalism which bodes well for this project. Above all, Estonian venues demonstrated the sort passion for what they do that will be necessary in a (hopefully) post-Covid world and which would benefit from sympathetic policies.

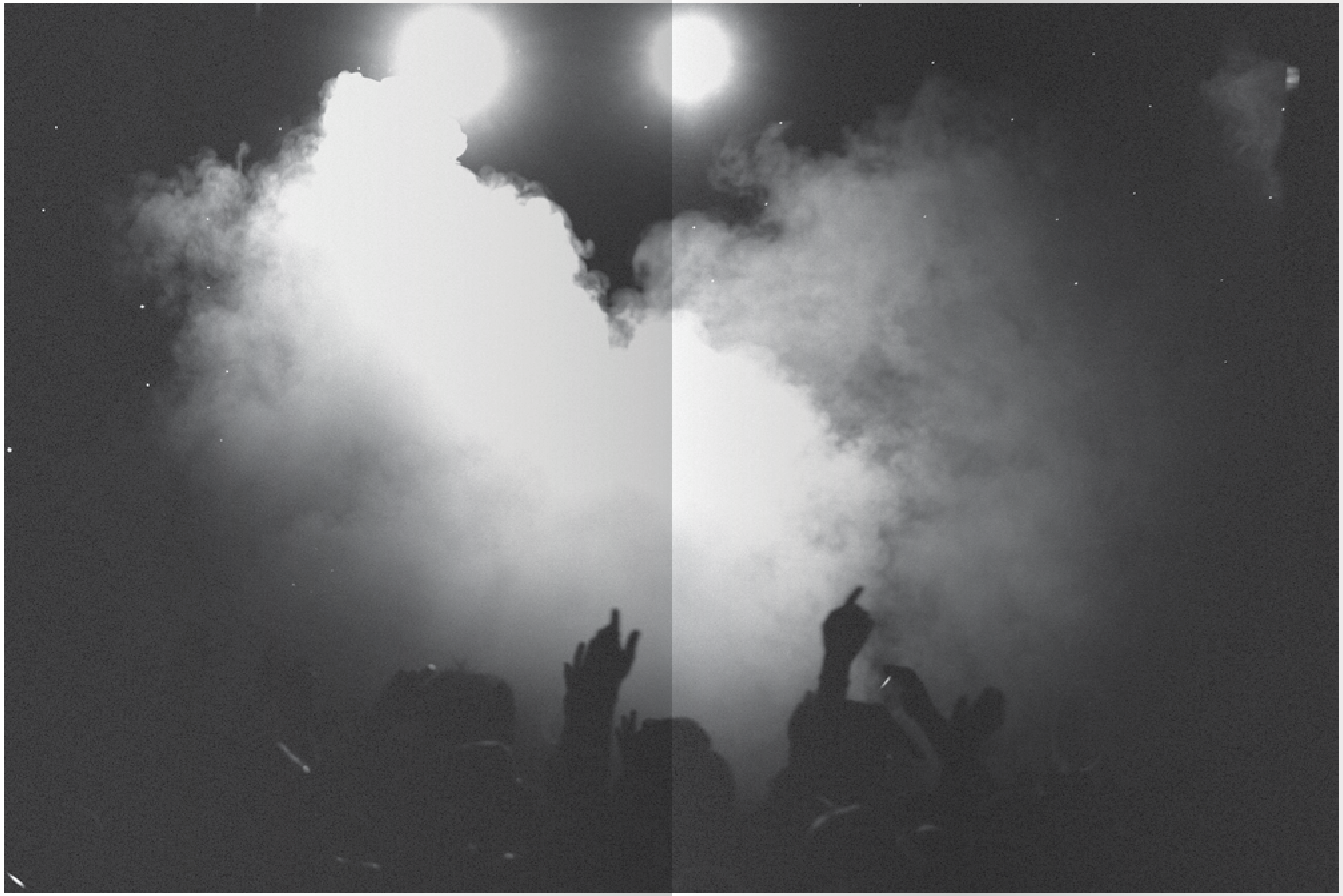
[5] This was also found in the Live DMA 2017 survey of venues across Europe (2020: 4) and in the UK a survey of venues found that 85% of them undertook other activities in addition to live music (Webster et al 2018: 32).

[6] The Agent of Change principle has been defined thus: '"Agent of change" means those bringing about a change take responsibility for its impact. If new developments are to be introduced near pre-existing businesses the "agent of change" principle places the onus on the developer to ensure solutions are put in place to mitigate any adverse impacts on existing businesses from the new development. For example, new residential accommodation may increase the likelihood of noise complaints that threaten a music venue business. The "agent of change" principle would require those responsible for the new residential accommodation to put measures in place to allow venues to continue to operate and co-exist, such as sound-proofing' (UK Music 2018: 2).

[7] It should be noted that venues varied greatly in the amount of foreign artists they staged. One venue reported that 60% of its hosted acts were foreign, another 5%. While there is not enough evidence here to draw many conclusions, the issue of attracting foreign artists (or not) may bear further discussion amongst the venues.

FINDINGS FROM ESTONIA: MUSICIANS

The Estonian musicians' survey received 22 responses from three venues: Kultuuriklubi Tempel, Philly Joe's Jazz Club and Sveta Baar. 64 % of the respondents were men and 27% were women, with 9% preferring not to say. The biggest age groups were 20-29 (36%) and 30-39 (32%), followed by 40-49 (14%) and 50 or more (9%), with 9% also being undefined. The youngest was 21 and the oldest 55. Most (73%) were either married or cohabiting, with 18% being single and/or divorced and those preferring not to say both being 5%. 36% were fully employed and the same amount freelance with an additional 5 % being self-employed. 9% worked at music on a part time basis. The largest group within socio-economic status was reported as "worker" (36%), with the groups "student", "entrepreneur", "manager" and "other" each accounting for 14% of the reported statuses. Career stage was mainly early (36%) and mid (41%), with the rest either being amateur or preferring not to say. Only 5% reported using an agent or manager to get live music booking over 80% of the time, with the majority stating never (68%) or less than 50% (27%). Guitarists (27%) and vocalists (23%) were the largest categories within musicians with drums and DJs (both 14%), percussion (9%), bass (9%), keyboards/piano (5%) also being cited. The main genres performed in were pop, jazz, metal, rock and experimental. The vast majority of the musicians were working in ensembles (or playing solo) performing original material (85%). Outside of being a musician, the most popular other roles worked in within music in addition to being a musician were in administration (N = 6) and promoting (N = 6).



A question about what sources of income respondents got from music in 2019 elicited 59 answers (from 22 people) with gigs (N = 16), “other” (N = 10), writing music (N = 10), teaching (N = 9) and recording music (N = 7) being prominent. The most popular source of income was from live music, which was cited by 44% of respondents. No other source came near to this with “other” (23%) being the next most popular and 19% of respondents not disclosing their main source of musical income. Thus, musicians showed both the customary diverse range of ways in which income can be derived from music and, within this, the dominance of live music as a source of income. This being the case, musicians obviously try to develop good working relationships with venues.

As Covid had severely disrupted live music in 2020, musicians were asked to compare the amount of gigs they did in 2019 with those they did in 2018. Here 23% said that the amount gigs increased and 27% said they stayed the same. However, 45% reported a decrease, suggesting that for many Estonian musicians, things were getting worse *prior to* Covid, something which can be contrasted to the somewhat rosier picture of the pre-Covid situation given by Estonian venues and both Finnish musicians and venues (see below). In addition 63% also reported working unpaid as a musician in 2019. Of these, 42% reported being asked between 2 and 4 times, and 11% over 10 times. When those musicians who had played for free were asked why they subsequently did it, responses included the event being for charity, for creative purposes and for family/friends. 35% reported that they did it to advertise their band.

Prior to Covid, the average number of gigs played by musicians per month varied between 2 and 24, with December, July and August said to be the busiest months and January and September the quietest. While there are some differences of emphasis here with the situation in Finland (see below) both cases serve to highlight the fact that live music is very seasonal. Small concert venues (N = 18), outdoor areas (N = 13) and bars (N = 12) emerged as the most regular venues for our musicians, with concert halls (N = 9) and medium sized venues (N = 6) also being popular.

The car was the most popular form of transport to get to gigs (81% and 5% more taxi) followed by public transport (10%). The mean average of distance travelled to play gigs was 984 km a month (median = 200).

A number of possible detrimental scenarios were presented to musicians as issues which may have impacted on their ability to play gigs in 2019 including raising property prices and noise regulations. Of these, only one seemed to be causing major problems – declining audiences. However, even this was cited by under 20% of respondents.

When asked what their music contributed to their local community, the most popular responses was, unsurprisingly, “by performing” (30%), although “by organising events” was close behind (26%). Other important impacts included “by providing performing opportunities to others” and “by training musicians” (both 11%).

When asked what words described the venues “jazz” were cited by many from Philly Joe’s Jazz Club, after which came “soul”, also from the same venue. While versatility of programming within venues was also praised, overall no one characteristic stood out. A question about what musicians liked about their venues, saw musicians particularly highlight factors such as it simply being a good venue, providing a good overall experience and having a good staff team. Musicians were asked what the government should do for music and, perhaps unsurprisingly, providing more financial support was the most popular response (N = 12). However it should also be noted that “Don’t know” was the next most popular (N = 6). 64% reported that they had never received any grants for playing live. Of the 36% who said that they had, the most important funders were the Cultural Endowment of Estonia (Eesti Kultuurkapital) (N= 7), the Estonian Authors’ Association (EAÜ) (N = 6) and the Estonian Performers’ Association (EEL) (N= 3).

The musicians surveyed here were largely people in their 20s and 30s and at an early to mid stage in their careers. The finding that they believed that the gig situation was getting worse *before* Covid is perhaps the most interesting one here. But it also reinforces the importance of live music and thus the venues within which it takes place. The fact that these musicians had little to say about potential government actions suggests that they see the private sector as the most important player in venues' futures. This is perhaps not surprising in a context where, according to the Estonian Institute for Economic Research, prior to Covid, 90% of Estonia's creative sector was not reliant on public sector support (www.ki.ee/publikatsioonid/valmis/1._Eesti_loomemajanduse_olukorra_uuring_ja_kaardistus.pdf).

FINDINGS FROM ESTONIA: AUDIENCES

Overall audiences seemed willing to attend all sorts of venues, provided that something interesting was on offer.

A total of 177 people completed the Estonian audience survey, with respondents answering from each of the four case study venues. 54% of respondents identified as female, 40% male and 6% other/preferred not to say. 79% of respondents lived in the same place as the venue which they were surveyed from. The largest age groups were 20-29 and 30-39 (both 31%), followed by 40-49 (17%) and 50 plus (12%), with the youngest respondent being 17 and the oldest 71. 51% were either married/in a registered relationship or co-habiting and 34% single. 59% were in full time employment, with students and self-employed (both 14%) being the only other significant categories. Within this 35% described themselves as workers, 21% “Upper-level employee”, 12% self-employed and 12% students, with 10% not answering.

96% reported no disability, 1% as having one and 3% preferred not to say. A total of 9 respondents reported having special needs which need attention in order for them to be able to attend gigs. Of these 3 had previously checked the relevant venue's website and found that these needs could be accommodated.

A wide variety of genres were reported to as being presented at the last gig which respondents had attended. Jazz was the most popular here, something obviously affected by the presence of a dedicated jazz club within the survey. Perhaps surprisingly, "experimental" was the next most popular category with "rock", "metal", "indie" "blues" "punk" and "rap" also being popular. Pop itself received few responses.

Social media emerged as by far the most important way to find about gigs, with 145 of 280 answers (from 177 people) mentioning this. "A friend/acquittance" was the next most popular way of finding out about a gig (N = 51), followed by venue website/mailing list (N = 34) and performer's website/mailing list (N= 17). No other means of advertising were cited by respondents.

Walking (N = 91, from 191 answers) and public transport (N = 43) were the most popular ways to travel to the last gig attended with taxi (N = 25) and car (N = 23) also being significant. Most attendance was local, although 19% reported travelling specifically to another place in order to attend their last gig. 19% reported travelling outside of their local area specifically to attend their last live music event.

Respondents reported a wide range of spending when attending gigs, with amounts varying between 0 and 200 €. On average audiences reported spending the following: local transport: 11 €, food and drink at venue: 22 €, food and drink outside venue: 18 €, merchandise: 19 €, accommodation: 11 € and tickets: 17 €. They reported spending an average of 19 € on tickets per month, with food and drink coming to another 29 € and another 20 € on festivals. Respondents reported spending an annual average of 285 € on tickets, 268 € on food and drink at venues, 229 € on travel and 150 € on accommodation.

On average those responding, reported attending 42 music events a year. A wide range of different types of venues were reported as having been visited by respondents in 2019 within which small concert venues, bar/club, concert hall and outdoor area were the most popular. Overall audiences seemed willing to attend all sorts of venues, provided that something interesting was on offer.

Artists would rather play here than that nightclub next door. In our venue, the audience comes to see the gig, not necessarily to get wasted.

The main reason given to attend was being a fan of the performers, closely followed by being a fan of the genre and then simply to relax. Other major reasons cited were spending time with family and friends, entertainment, supporting musicians and improving one's mood. The most popular genres amongst respondents were rock, jazz, metal, indie and experimental. There was a strong bias towards artists performing original material as the type of event which respondents attended in. 2019, with 234 of 623 responses mentioning original material, something only rivalled by EDM (N = 64).

The major factors which put respondents off attending live music were not having enough time, matters of expense and not enough local events being interesting to them. However, all of these were of concern only to a minority of audience members, with most not seeing any major reasons putting them off attending. Contrarily the attractiveness of the venue was something which could generate audiences, as was the quality of things such as sound and having cheaper tickets. The reselling of tickets did not seem to be a major issues with only 3% reporting buying a ticket in 2019 with the express aim of reselling it.

16% of respondents reported that they volunteered at venues. On average volunteers did around 2 hours a week of volunteering. The main motivations for doing so were to meet new people, use skills, help family/friends, receive free tickets, having free time and wanting to develop new skills. Here a number of motivations were present and venues seeking volunteers may wish to consider what they offer in return and seek to be the “venue of choice” for volunteers.

Popular responses to being asked to describe live music in their venue in up to three words included it being “friendly, cozy, alternative, homely, versatile, pleasant, open and cool”, with friendly being the most popular response in two of the four venues.

When asked to name a venue which had been particularly important to them, respondents noted all our case study venues and also Tallinn’s Von Krahl Theatre as being particularly important. When asked to describe live music in their location in three words, the most popular was “diverse”, followed by “little”, then “quality”, “versatile”, “evolving”, “innovative” and – on the down side – “boring”. However, overall it was clear that audiences valued diversity and versatility, factors which venues should be highly aware of.

Commentary

Our Estonian audience respondents were largely aged 20-39 and keen music fans who valued original music and who let few things put them off attending. Overall here it was clear that seeing live music was a particular form of pleasure with connotations of having a good time and escaping daily cares. As such, respondents exhibited a willingness to spend money on live music which bodes well for its future. The fact that many respondents also volunteered at venues, also bodes well for their future.

FINDINGS FROM FINLAND: VENUES

Visits to Finnish venues were undertaken in late August and early September 2021, with audience and musician questionnaires being distributed in August and compiled in October. A number of issues were highlighted by venues, of which the highlights are included here. These included the *pride* which venues had in their work and accomplishments, the *variety of activities* which venues were involved in, the *impossibility of making money from live music alone*, the fact that *venues provide cultural experiences*, the *importance of audiences*, *future planning*, the *effects of Covid*, varied *ownership models* and a range of *miscellaneous* issues.

Venues portrayed a great deal of *pride in their work*. This should not be interpreted as arrogance, more a feeling of a job being well done. For example, the 45 Special club in Oulu reported that 2019 had produced more sold-out gigs than ever before. During the Covid lockdown its live streaming of shows had reached 0.5 million people and the venue speculated as to whether this might be a record for a Finnish venue. Similarly, it believed that its 31 years of uninterrupted jam sessions might also be a Finnish record. Maanalainen reported its pride in being awarded the Cultural Act of the Year award from the city of Tampere in 2018 and providing 300 performances a year, while in Helsinki Bar Loose expressed pride in being a stepping stone for up and coming bands.

In terms of their *activities*, it should be noted that, as was the case in Estonia, the venues were much more than simply that. For example, 45 Special has a pub on the first floor, a basement which hosts DJ and jam sessions and a second floor for gigs. Similarly, Bar Loose has a pub and function room on the first floor, with its basement hosting gigs and discos. In Lahti, Torvi is the first floor venue, but part of the same company runs the Tirra restaurant upstairs which is also used as an occasional venue. In Tampere Maanalainen has a first floor bar and a basement which houses its gigs. With the diversity of provision on display Helsinki G Livelab stood out as a stand-alone, purpose-designed, venue.

As in Estonia, venues rarely hosted just gigs. For example, Special 45's gigs were mainly on Friday and Saturday, while other nights of the week featured jam sessions, stand-up comedy, open decks and music quizzes. Maanalainen also hosts art exhibitions, music quizzes, "drink 'n' draw" evenings, stand-up comedy, theatre, poetry evenings and DJ sessions. While the reasons why venues were involved in other activities and the sorts of activities this incorporated were historically determined, there was a common feeling that this was a necessity and that *it was very hard to make a venue economically viable through providing only live music*. Thus the other activities were usually undertaken out of necessity as venues reported that gigs are often not enough to keep a small venue going on. Thus having things such as a night club or a restaurant were necessary as part of the overall business model.

Venues reported that it was not viable to open every night and their responses again vividly illustrated the nature of the *live music calendar*. It became clear that October and November were the key months for live gigs in Finland and, unsurprisingly, that Friday and Saturday were the key nights. Bar Loose reported that 95% of its income came from those nights. More broadly the difficulties of running a small venue were articulated by a representative from Maanalainen who said that: 'I hope that the people holding the keys to the state money bin realise that in our current society, running a small venue is not profitable business, and it's not possible to make it profitable. The only way you're going to break even running a venue is if you have the ability to make the necessary adjustments for the place to also host a restaurant [serving food]. The live audience's euros are not enough.'[8]

It was also clear that venues were aware that they were offering something *cultural*. Thus 45 Special told us: 'Artists would rather play here than that nightclub next door. In our venue, the audience comes to see the gig, not necessarily to get wasted.'

The emphasis on a *cultural* experience was perhaps most evident in the G Livelab Helsinki venue which is run by Livelaborotorio Oy, a company owned by the Finnish Musicians' Union. The venue has been designed with musicians and their needs in mind, especially those relating to the need for musicians to hear themselves while performing. The venue was also proud of paying decent fees and having an "unbelievable" backstage area for musicians' comfort. Torvi reported that it aimed to be fair priced and Maanalainen that all performers were paid.

It should also be noted that "culture" can be interpreted broadly. Thus Torvi proudly described itself as being 'The cradle of bar culture in Lahti'. However, it was also clear that it was an established and essential part of Lahti's live music scene, with a slightly bohemia style. Its website proclaims it as 'Finland's most legendary rock club' (https://ravintolatorvi.fi/en/) and it also demonstrated a commitment to music in the town: 'Our business idea is to offer a platform for local culture, mostly music. We aim to activate live music in this city, and maybe even increase supply in that field. The other point of our business is to maintain the pub upstairs [Tirra] as a place where everyone can relax and have a good time.'

In Tampere Maanalainen expressed a commitment to culture via *supporting the city's live music scene* and especially bands which did not currently have a large fan base. This included a regular debut band night. In Lahti Torvi's respondent noted that many people could not imagine life without the venue. Meanwhile allied to the notion of culture, was that of a certain set of values which some of the venues

shared. For example, Bar Loose said that: 'Loose has a bit of a hippie reputation, characterised by solidarity. There was never room in here for prejudiced people. This is a zero violence bar. I think people feel safe here. You get to look any way you look, as long as you respect others and their space'

Venues were also *keenly aware of their audiences*. 45 Special reported that many of its customers were students who tended to leave Oulu on completion of their studies – 'We have a regular clientele… who might later decide to move out of Oulu'. Thus every (academic) year entailed the search for new customers. In Helsinki Bar Loose reported having around 300 regular customers whom it emails 3-4 times a year. It had also experienced a range of problems because of noise complaints by one neighbour. Maanalainen also noted that noise concerns had resulted in it having to invest a lot of time in acoustic planning (such as the location of the P.A:) in order to avoid complaints from neighbouring apartments. Torvi reported that it attracted both local students and city officials, as the latter has an office building nearby. It also reported attracting customers from Helsinki (helped by a good train connection) and from the Kymenlaakso region.

Meanwhile the listening experience for audience members in G Livelab Helsinki was said to be the best in Finland, resulting in silent audiences simply listening to shows. As the venue put it: 'The atmosphere is sometimes like a church. You concentrate on the music in a whole different way when you can hear it well'. This being the case, the venue was keen not to disrupt the listening experience and its G Livelab app allowed people to order drinks without need to leave their seats.

One key factor which emerged here was how much the venue attracted passing trade which was not primarily attracted by the music offering. Here Torvi reported that as it was not in the city centre, customers had to know about the venue and actively seek it out. Similarly, Bar Loose reported that its local neighbourhood was not a source of passing trade and that casual pub attendance had declined as Kallio became the centre of that activity within Helsinki. It further noted that processes of gentrification meant that it now attracted few customers from its local neighbourhood.

Venues were considering a range of *options for the future* and, indeed, future planning emerged as something of a preoccupation. 45 Special was examining the possibility of using an adjacent parking area as a festival space[9], more cooperation with student organisations and developing its YouTube channel. Torvi already has its own music festival, Kaupungin äänet ("Sounds of the City") and it also stages the Ant Fest beer festival in addition to providing bar services to other festivals. Maanalainen reported that it was going to experiment with mini festivals and pop up events. More broadly it was clear that festivals were playing an increasingly important part of venues activities and business plans and this is something which venues may wish to discuss collectively.

The five venues here showed the complexity of the small venue circuit in Finland

Torvi noted the potential of having 25,000 inhabitants within a 2km radius. It was also seeking to arrange events in the new Sammiosali concert hall. Maanalainen believed that metal was spearheading a revival of live music which would pay dividends in the longer term and was concerned that its current space was too small and its rent is too high.

The *effects of Covid* were obviously felt by venues, albeit to different degrees and in different ways. The loss of revenue, and the impact on staff and musicians were keenly felt across the board. G Livelab Helsinki reported that its business was flourishing prior to Covid and that it had tried to adapt once the pandemic was underway. However, it also noted that, given fixed costs such as sound engineering and maintaining equipment: 'There is no way you'll break even on streaming'.

Perhaps less recognised in the public discourse, but clearly of importance to musicians, was the effect that shutdowns would have on the *culture of live music*. Thus G Livelab Helsinki suggested that: 'There is a kind of a risk that people might have found something else to do during the pandemic. So they might not bother going out to see gigs. It might take some learning to get back to normal'. Similarly, Bar Loose spoke about how many people had told them of their fear that the venue would go under, so that 'we lose the last good venue and nightclub in the city centre´. They also noted that Covid had obviously affected cash flow. Maanalainen reported that they were concerned that cultural grants which they had received prior to the pandemic would not be available after it, potentially undermining the venue's viability.

You get some income from music, but all of that goes into financing your musical hobby. You need a day job for your bread and butter.

It should also be noted that venues varied considerably in their *ownership models*. Bar Loose's owners also own restaurants, G Livelab Helsinki is owned by the Finnish Musicians' Union, 45 Special is owned by a company run by a father and son, Torvi is co-owned by WestStar Oy and run by Torvi-Tirra Ravintolat Oy, which owns the restaurant which is on its second floor and Maanalainen is owned by the Trelmu ry cooperative, which promotes both live music and DIY culture.[10] Torvi benefitted from the fact that it owns shares in the company which owns the building in which it is housed and so it only pays for common charges and not rent. This was reported as being vital to making the venue viable. The implications of ownership patterns go beyond the remit of this report, but at least two things are worth noting here. First, the ownership of a venue obviously shapes its staff's conception of whom they think are ultimately responsible to. Secondly, it illustrates again the point that "there is no such thing as a typical venue".[11] It should be noted that each of the venues was aware that it was part of a broad alliance of stakeholders which interacted in various ways and within which various power dynamics might be discerned.

A range of other issues were also raised by venues. It was apparent that the economic viability of gigs is currently somewhat dependent on sales of alcohol. In part this is an historical legacy based on a combination of the fact that many venues have small capacities, receive no public funds, cannot not charge too much for tickets – and so have became reliant on alcohol sales to make gigs viable. However, two of the venues reported that younger people are nowadays generally consuming less alcohol. While this may have potential health benefits, it also has the potential to impact negatively on venues' finances. In one case this had led to less free gigs being staged. Certainly the implications of this bear closer scrutiny. Meanwhile four venues reported that they had been forced to make renovations because of *noise concerns* and there certainly seems scope for government to help here. It was also noted that there were variations across Finnish cities, about noise regulations and, for example, what the latest time terraces may be used for hosting amplified live music is.

Expectations for the projects

As was the case in Estonia, Finnish venues were also asked what they wanted from this report and raised the following points:

- It would be good to discuss what the future developments for venues are
- It would be good to know what is happening in Tallinn and Estonia. The Telliskivi area of Tallinn was highlighted as being particularly interesting
- There is a need to meet other venue actors face to face and network
- Getting to know other venues would be useful
- Venues could cooperate more by, for example, coming together to book both international and domestic artists

- Venues could collaborate to create programmes that would tour around all the venues over the course of several nights in a run

- The cooperation could become a channel for cultural exchange (Finnish musicians to Estonian venues and vice versa)

Commentary

The five venues here showed the complexity of the small venue circuit in Finland. If previous research has shown that 'there is no such thing as a typical day for live music' (Webster *et al* 2018: 10), then this research has shown that there is no such thing as a typical live music venue in Finland. Factors such as location (including local regulations), ownership, clientele, music genre, business model and future aspirations are all vital. Nevertheless, one unifying factor was the passion that venues have for the music they provide and this shone through. As ever, venues' main issue is how to combine cultural ambition with commercial nous. Despite Covid, our Finnish venues were looking optimistically towards the future. In doing this they were aware of their own problems, but remained outward looking.

[8] Here it should be noted that Live DMA found that just 1% of venue's income in Finland came from any form of subsidy, a comparatively very low figure.

[9] Live DMA reported that in 2017 40% of Finnish venues were also involved in festivals

[10] See https://www.facebook.com/TRELMU/

[11] Live DMA found that 20% of Finnish venues were publicly owned, 30 private not-for-profit and 50% commercial (2020: 40). For different business models see ibid: 12-13.

FINDINGS FROM FINLAND: MUSICIANS

After the event you hear people say they can bear their everyday life a little better.

The Finnish musicians' survey received 41 responses, 85% of whom were men and 10% women, with 5% being other or preferring not to say. Most were aged between 30 and 39 (51%), with 20% being 20-29 and 22% 40-49. Only 2% were less than 20 years old and only 5% over 50, the youngest being 18 and the highest age being 56. 44% were fully employed (although not necessarily as musicians), 15% self-employed and 20% worked at music on a part time basis. 59% reported being semi-professional musicians, 12% fully professional musicians and 29% amateur. One semi-professional said that: 'You get some income from music, but all of that goes into financing your musical hobby. You need a day job for your bread and butter' and another that: 'Music is a dear and precious hobby'. A third reported that they were 'Amateur or semi professional. I've done some festivals and European tours, but mostly my income from music roughly amounts to breaking even'.

As with Estonia, the career stage of the Finnish musicians was largely early-to-mid, with a few in either their very formative or later years. The most popular other non-musician roles worked in within music were for a record label (N = 9) and for festivals/music events (N = 9). Additionally 20% were students. Instrumentally 44% were guitarists, 29% vocalists, 12% bassists, 10% drummers and 2% either piano/keyboards of other instruments. All reported writing their own material, with writing and performing original material far outweighing any covers' activities. Rock was the highest genre reported to be worked in (63%), although many others were mentioned.

Prior to the onset of Covid, most Finnish musicians reported a healthy amount of gigs. When asked to compare the amount of gigs they did in 2019 with those they did in 2018, 51% said that the amount gigs increased and 32% said they stayed the same. 46% reported getting increased income from gigs and 29% reported income remaining the same. This was markedly more upbeat than the response from Estonian musicians. However 59% of Finnish musicians also reported working unpaid as a musician in 2019. When asked why they did this, responses included it being fun, a nice event which only had a small budget, a favour for a friend, a birthday, at a children's party and a charity event. Three reported being told it was good for their careers/visibility and one reported that: 'Showcase gigs are a pestilence'. Overall, while one musician said that: 'Money doesn't really matter as long as you get to play', the general feeling was perhaps that breaking even was the minimum that should be tolerated.

The vast majority of our musicians (N = 39) had received income from performing live in 2019, a majority (N = 29) had received income from writing music and over half (N = 25) as a recording artist. Around three quarters never or rarely used an agent to get them gigs. This is broadly in line with the Estonian findings, suggesting that small venues of the sort surveyed in this research act as homes to those musicians in the early to mid-career stage. Just over a third had received some form of grant for their live performance at some stage, with the Finnish Music Foundation (MES) and the Arts Promotion Centre (TAIKE) being the most popular funders.

The car was the most popular form of transport to gigs (76%) followed by public transport (20%). The mean average of distance travelled to play gigs was 1 359km a month. The average number of gigs per month varied between 0 and 22, with July and October being the busiest months and January and December the quietest. Small venues (N = 34) and Bars (N = 33) emerged as the most regular venues, with outdoors (N = 23) also being popular.

The main issues identified as problems in obtaining gigs prior to Covid were diminishing audiences and increasing competition, with over 20% of musicians reporting these as have either an extreme, strong or moderate impact. However, in each case these were far outweighed by musicians saying that such issues were having none or only a slight impact. Stagnating pay levels (over 50%) and lack of venues (over 60%) were both seen as serious issues. One musician reported that: ‘Most of the rock clubs don’t pay actual fees to small bands. Shows that pay a percentage of the door takings also require the bands to do all of the promotion work, and the venues don’t do anything to promote the events’.

When asked to describe the venue they were associated to for purposes of the survey, the most common phrases related to the space – “small, smallish, comfortable, compact, intimate”, its atmosphere – “homely, familiar, easy, atmospheric” and status – “important, legendary, stepping stone, understands being a musician”. When asked further what they liked about the report’s venues, musicians reported such things it being ‘proper old-school rock club’ which also had an open mind towards other genres, not feeling exploited by the venue, professional and smooth practices, nice staff who make musicians feel welcome, being the best venue in town, having a good vibe, being a good location, supportive of the local scene and making things happen. While none of this is particularly surprising, it is a reminder to venues of what they need to get right.

Such things do not occur naturally and venues may wish to share experiences about how they set the right tone for musicians.

When asked what venues had been significant to them, in addition to naming survey venues, musicians also mentioned places such as Tavastia, Lepakkomies (both Helsinki), Vastavirta Klubi (Tampere) and TVO (Turku, now closed). When asked to justify their choice musicians cited things such as the venue being long-established, its “legendary” status, musicians being close to the audience, a DIY ethos, having underage shows, paying artists properly, having good staff, having a good sound, providing artists with food and drinks and having good facilities, including a sauna. Again such factors serve to remind venues of what they need to get right in order to garner musicians’ support.

When asked what their music contributed to their local community, some musicians cited modesty and either did not want to say or downplayed their role as being no more than anyone else’s. Others highlighted being part of a music community/network/scene, while another group cited the sheer enjoyment and fun of entertaining people. The potential effect on audiences was also vital and one musician reported that the main contribution was that ‘after the event you hear people say they can bear their everyday life a little better’. Several cited work which was not directly music making, such as working as a studio technician, organising events or offering other musicians business advice as being important contributions which they had made. One woman musician noted that she was a rarity in her genre and so had an important to play as a role model.

A question about governmental bodies should be doing to help improve the live music scene, elicited a response from one musician who specifically mentioned the Agent of Change principle. They suggested that: ‘Helsinki has already lost several venues because international real estate investment companies have built business premises in neighbouring houses’ and believed that implementing the Agent of Change principle would be beneficial in preventing such things from occurring. Other areas where government was seen to be able to help included taking action on high rents, providing spaces for both practice and performance, helping venues pay artists and supporting smaller venues as well as the big, prestigious, developments which government at all levels has tended to prioritise. It was also felt that a mixed economy was necessary, with one musician opining that ‘a market approach will never sustain a diverse music culture in a country this small’, although another suggested that there is already enough public sector support.

Summary

Overall the Finnish musicians’ survey showed that while many musicians just wanted to play, others believed that they should be justly rewarded financially for doing so. All were obviously keenly aware of the importance of having good venues and the responses which are most germane to this report act as reminders to venue of the sorts of things they need to get right if they wish to retain musicians’ support. Paying properly, providing good facilities, considering musician-audience interactions and generally providing a convivial working environment are high on this list. The fact that these might appear to be “commonsense” should not be allowed to obscure their importance to the musicians whose attitudes are reported here.

Importantly a number of respondents also referred to their venue as being the place when — as a young person — they learned about the joy of live music.

[12] Twelve respondents did not answer this question.

FINDINGS FROM FINLAND: AUDIENCES

A total of 129 people completed the Finnish audience survey, mostly from Helsinki and Lahti. 74% of respondents lived in the same place as the venue which they were surveyed from. The largest age group was 30-39 (36%), followed by 20-29 (27%), 40-49 (24%) and 50 plus (13%). The earliest year of birth was 1969 and the latest 2001. There was a good gender balance with 48% men, 44% women, 5% preferring not to say and 2% Other. 60% were in full time employment, with students (14%) being the only other significant category. 91% reported no disability, 5% as having one and 4% preferred not to say. Respondents reported attending between 0 and 130 gigs a year, with a mean average of 27. In short, our Finnish audience respondents were obviously very knowledgeable about live music.

Responses to being asked to describe live music in their venue in up to three words included it being “underground, eclectic, interesting, good quality, alternative, broad, local, unique, authentic”. A wide variety of genres was said to be present in the venues. Popular ones included Rock (cited by 19% of respondents), Indie (17%), metal and punk (both 16%). “Other” was cited by 12%. Those who made further comments often stressed that diversity – both in terms of genre and career stage of artist – as key factors which attracted them to the venue. They pointed out that this meant that there was ‘something for everyone’. It was clear that once a venue was trusted, then people were more willing to take risks and see artists with whom they were not necessarily that familiar.

The vast majority of music performed at the last gig attended at the venue was original material by either bands (73%) or solo artists (11%). Similarly, respondents reported that the type of music they were mostly going to in 2019 was original material by either bands (N = 124) or solo artists (N = 79). As in Estonia, social media was by far the most common way of finding out about gigs (mentioned by 104 respondents) followed by word of mouth (N = 30), venue publicity (N = 25) and artists’ websites (N = 17).

Public transport (N = 59) and walking (N = 38) were the most popular ways to travel to the last gig attended, with car being only 19 – a distinct contrast to the Finnish musicians’ survey (although musicians do, of course, need to take instruments and other equipment with them to gigs). These figures were similar to general travel to gigs in 2019, with public transport and car the most popular ways to travel, followed by foot and bicycle. Most journeys were quite small, with a mean return journey of 28km (median = 8km) and a maximum return journey of 480 km. 22% of respondents reported travelling outside of their home town to their last gig, but only 3% reported paying in paid accommodation to do so, with 31% staying with a friend or relative. The mean average spend in total at the last gig was around 81 € (median = 54 €). It should be noted, that a few respondents commented on the difficulty of calculating such figures, as such spending was just something they did while rarely reflecting on the amounts involved.

When asked why they attended, the most popular reason was the artists (N = 104), entertainment/good night out (102), “going to gigs is a fundamental part of who I am” (94), to relax/escape from everyday life (94), to enhance my mood (90), to spend time with friends (86) and to support musicians (83). Spending on small gigs had a mean average of 30 € (median 25 €) per month, spending on bigger concerts averaged 28 € (median 20 €) per month and on recorded music 25 € (median 15 €) a month. Respondents reported spending a mean average of 402 € on tickets per annum, 675 € on food and drink, 189 € on travel and 166 € on accommodation – a total of 1 432 € a year. There was something of a divide amongst respondents wherein many had an attendance pattern based on supply – they went if there was something in which they liked, whereas a few attended more ritually - mentioning going every weekend for example – and placing less emphasis on *who* was playing.

Respondents reported spending an average of between 0 € and 3000 € a year on tickets for live music events in a "normal" times, with a mean average of 402 €.12 Reselling of tickets did not appear to be a major issue, with 62% saying that they did not resell a ticket in 2019 and 30% reporting that they variously wasted it , gave it away, but sold at face value or sold it at less than face value. Only 1% reported buying a ticket with the aim of reselling it for a profit, while a number of respondents made disparaging comments about the reselling tickets for profit.

In terms of volunteering, 27% of those who answered (N = 82) reported volunteering within the live music sector (predominantly in music festivals) in 2019. This is a high figure, but Live DMA has also noted the importance of volunteering in Finland (2020: 40). The most popular reasons for volunteering were helping friends/family, meeting people, using existing skills, getting free tickets/entrance and having spare time.

In addition to the report venues, audiences reported Tavastia, Nosturi, Lepakkomies, On the Rocks (all Helsinki), Lutakko (Jyväskylä) and Möysän musaklubi (Lahti) as important places to them. Reasons cited for this were memories of gigs at the venues, their atmospheres and - once again - the diversity of artists performing. Importantly a number of respondents also referred to their venue as being the place when - as a young person - they learned about the joy of live music. The lesson here for venues is that they need to cultivate younger audiences and ensure that going to gigs becomes part of what they do.

When asked what they got from going to gigs, many reported experiences such as feeling good, joy and getting away from daily

life – 'gigs are an energy boost, something to look forward to among the daily grind' and 'You can forget all your troubles at a gig'. Respondents also said that they got: 'Every possible feeling, most importantly feeling free' and: 'All kinds of feelings, authenticity, energy, special experiences, a feeling of belonging, therapeutic experiences'. Key words for describing the state of local live music were 'eclectic, rich, interesting, broad, alive'. More problematic terms included 'expensive' and 'redneck'.

The main thing putting people off from attending was said to be not having enough time, with some expressing concern that gigs started too late in the evening or were sometimes not interesting enough, although in both cases these were outweighed by people saying that such issues were *not* a problem. The most likely thing to encourage people to attend more shows was more provision in bars and restaurants (cited by 33%), followed by more/a greater variety of venues (16%) and earlier performance times (15%). No other reason was cited by more than 9% of respondents. However, it should be noted that a few respondents made further comments about wanting earlier gigs. This was especially the case if gigs were midweek and if respondents described themselves as being older. The most popular genres attended were Rock (N = 97), Punk (71), Indie (61) and Metal (48). Both pop and hip hop were mentioned by 40 respondents.

Respondents reported going to a range of different sorts of venues in 2019 with bar/restaurant being the most popular (N = 113), followed by small venue (N = 94), Outdoor green space (N = 87), medium sized venue (N = 77), outdoor urban (N = 74) and concert hall (N = 66). Thus, as with Estonian audiences, Finnish audiences were willing to attend a range of venues in order to enjoy live music.

Commentary

The evidence from Helsinki and Lahti suggests that audiences in these venues value a diversity of provision and want to see artists performing original material. They want to see particular artists and are willing to spend quite considerable amounts in order to do so. Audiences also want to get out of their daily routine and live music plays a vital role in this. While the high level of volunteering reported here is largely based on working at festivals, it is at least in principle something which venues may wish to discuss and encourage.

CONCLUSIONS AND RECOMMENDATIONS

This report has been a long time coming. A bid first submitted in 2019, led to research which began in 2021, by which time the world was a very different place. It is also important to bear in mind that this report is part of a bigger project. The applicants for the funding for this project designed the research so that it would be a step along a longer road. In particular, it was hoped that the research undertaken here would be the first step towards greater collaboration between venues in Estonia and Finland. It is anticipated that venues will meet to discuss this report and so what follows is a list of questions which venues may wish to discuss. If the original bid which resulted in this research came from a world which has now gone, then what follows is an attempt to encourage venues to begin a discussion about how they can cooperate in the Brave New World with which they are confronted. I wish them well.

Based on the evidenced gathered during the research, it is recommended that:

As venues' prime purpose is programming, they collectively should discuss how they programme, including how they monetise non-music events. Another key theme of this discussion should be the diversity of performers presented, something which both audiences and musicians cited as being important to them.

Venues should share information about the staging of their own festivals and both the opportunities and problems which this may bring.

Given the importance of social media, venues should discuss how best to utilise it and especially the development of YouTube sites, streaming of gigs, bespoke television channels and models of funding such as Patron and Mesenaatti.

Venues should initiate a discussion of a range of equalities issues, including, sexual harassment (following campaigns such as #punkstoo, #metaltoo and #suomirarapstoo in Finland) disabled access, gender equality in programming and being safe spaces for LGBTQ people. They may wish to engage specialists and explore the possibility of public funding for such work.

Venues should discuss developing best practices for volunteers, including ways of turning volunteers at their festivals in to more frequent volunteers

As Finnish venues express a clear desire to collaborate and Estonian venues are clearly outward looking, venues should therefore consider how best to foster this sentiment including discussing the feasibility of becoming a network which helps acts to tour.

Venues should discuss how to attract, maintain and develop audiences, especially younger ones.

Venues should discuss their unique selling points and how best to utilise these to attract, retain and develop audiences.

Venues should discuss their business models in terms of the percentage of their income which comes from various activities. One notable finding from the Finnish research was a suggestion that some gigs are not viable without sales of alcohol. If this is the case, then if sales of alcohol decline then the economic viability of such gigs will be brought in to question, despite the potential health benefits which may accrue via less alcohol consumption. Venues may therefore wish to discuss how to monetise gigs which are not reliant on alcohol sales.

Venues should remain aware of the need to work with local government and Live Music Estonia and LiveFIN should provide assistance in the fostering of good relations. There is a continual need to educate policymakers about the reality of running venues and individual venues alone are rarely in a position to be able to do this. They should therefore discuss how to do it collectively.

Venues should discuss how to deal with the rhythm of the musical calendar wherein most activity takes place at weekends and in certain months.

Venues should discuss how they make musicians performing at them feel welcome and what they consider to be best practice here.

LiveFIN should consider meeting with Kuntaliitto (the Association of Finnish Municipalities) and Live Music Estonia with Eesti Linnade ja Valdade Liit (the Association of Estonian Cities and Municipalities) to discuss matters of mutual interest.

Live Music Estonia and LiveFIN should discuss the Agent of Change principle and, if it is seen to be desirable, open up discussions with government at all levels (town/city, region, national) with a view to implementing the principle.

BIBLIOGRAPHY

C. Ballico and A. Watson (ed.): *Music Cities: evaluating a global cultural policy concept*. Basingstoke: Palgrave Macmillan.

Behr, A., Brennan, M. and Cloonan, M. 2020. "The UK live music census: making live music count in Glasgow, Newcastle, Oxford, and beyond" in C. Ballico and A. Watson (ed.): *Music Cities: evaluating a global cultural policy concept*. Basingstoke: Palgrave Macmillan, pp.167-188.

Behr, A., Brennan, M., Cloonan, M., Frith, S. and Webster, E. 2016. "Live Concert Performance - an ecological approach", *Rock Music Studies*, 3:1, pp.5-23.

Behr, A., Brennan, M., Cloonan, M. and Webster, E. 2021. "Stop making census! Some experiential reflections on conducting a Live Music Census" in R.Osborne (ed.) *Music By Numbers*. London: Intellect, pp.104-120.

Behr, A. and Cloonan, M. 2020. "Going spare? Concert tickets, touting and cultural value", *International Journal of Cultural Policy*, 26:1, pp.95-108.

Behr, A., Webster, E., Brennan, M., Cloonan, M. and Ansell, J. 2020. "Making live music count: The UK live music census", *Popular Music and Society*, 43:5, pp.501-522.

Bourdieu, P. 2011. "The forms of capital (1986)", in I.Szeman and T.Kaposy (ed.) *Cultural Theory: An Anthology.* Oxford: Wiley-Blackwell, pp.81-91.

Cloonan, M. 2011. "Researching Live Music: Some thoughts on policy implications", *International Journal of Cultural Policy*, 17:4, pp.405-420.

Cloonan, M. 2012. "Selling the experience: The worldviews of British concert promoters", *Creative Industries Journal*, 5:1/2, pp.151-170.

Cloonan, M. 2016a. *A Passion driven industry*. Report for the City of Sydney.

Cloonan, M. 2016b. "Watching them walk out taller than they walked in: Sydney's venues in 2016", *Perfect Beat*, 17:2, pp.104-123.

Cloonan, M. 2018. *It's good that they're listening*. Report for the City of Sydney.

Cloonan, M. 2022. "Problematising music cities" in Homan, S., Strong, C., O'Hanlon, S. and Tebbutt, J. (ed.) *Interogating popular music and the city*. London: Routledge.

Crossley, N. *Connecting Sounds: The social life of music.* Manchester: Manchester University Press.

Frith, S. Brennan, M., Cloonan, M., and Webster, E. 2013. *The History of Live Music in Britain*, *Volume 1: 1950-1967*: *From The Dance Hall to the 100 Club.* Farnham: Ashgate.

Frith, S. Brennan, M., Cloonan, M., and Webster, E. 2019. *The History of Live Music in Britain*, *Volume 2: 1968-1984. From Hyde Park to the Hacienda*. London: Routledge.

Frith, S. Brennan, M., Cloonan, M., and Webster, E. 2021. *The History of Live Music in Britain*, *Volume 3: 1985-2012. From Live Aid to Live Nation*. London: Routledge.

Hätinen, J. 2019. "Suomen musiikkitapahtumien verkosto ottaa kantaa Helsingin tilanteeseen: Elävä kulttuuri tarvitsee tilaa". *Rumba* 16.10.2019.

Holt, F. 2020. *Everyone Loves Live Music: A Theory of Performance Insitutions*. Chicago: University of Chicago Press.

Homan, S., Cloonan, M. and Cattermole, J. 2015. *Popular Music Industries and the State: Policy Notes*. London: Routledge.

Live DMA. 2020. *The Survey: Live music venues and clubs in Europe: Fact and figures*. https://www.live-dma.eu/wp-content/uploads/2020/01/Live-DMA-Survey-Report-Live-Music-Venues-data-2017-publication-January-2020-1.pdf

Live DMA. 2021. *Impact of the Covid-19 pandemic on music venues and clubs in Europe, https://www.live-dma.eu/wp-content/uploads/2021/10/Covid-Numbers-V4.pdf*

Malin, R. 2019. "Helsingin ja Suomen viihde-elämä kokee kolme raskaimman sarjan menetystä putkeen – päättäjät sormi suussa", *Talouselämä*, 15.10.2019 www.talouselama.fi/uutiset/te/609decca-9b25-48f1-974b-52683e7adef7?fbclid=IwAR0h-eyTJdhScBm0_4df09GmX6clYlPvXG8YFdeGy1uXwzGAh1YOxA8n4Hw

Mayor of London. 2015. *Rescue Plan for London's Grassroots Music Venues*. London: London Assembly.

Mayor of London. 2017. *Rescue Plan for London's Grassroots Music Venues: Making progress*.

London: London Assembly.

Straw, W. 1991. "Systems of articulation, logics of change: Communities and scenes in popular music", *Cultural Studies*, 5:3, pp.368-388.

UK Music. 2018. *National Planning Policy Framework and Agent of Change*. London: UK Music.

Webster, E., Brennan, M., Behr, A. and Cloonan, M. 2018. *Valuing Live Music: The UK Live Music Census 2017 Report*, http://uklivemusiccensus.org/wp-content/uploads/2018/03/UK-Live-Music-Census-2017-full-report.pdf

Williamson, J. and Cloonan, M. 2007. "Rethinking the music industry", *Popular Music*, 26:2, pp.305-322.

Williamson, J., Cloonan, M. and Frith, S. 2013. Mapping the Music Industry in Scotland. Glasgow: Scottish Enterprise. Available at: http://www.livemusicexchange.org/wp-content/uploads/Williamson-Cloonan-Frith-Mapping-the-music-industry-in-Scotland-2003.pdf

Research supervisor & advisor:
Martin Cloonan

Estonian research team:
Egge Kulbok-Lattik
Marge Sassi

Finnish research team:
Maarit Kinnunen
Reeta Pankka

Project manager:
Ingrid Stroom

Designer:
Viktor Gurov

Published in May 2022 by

MUSIC ESTONIA.EU

LIVE FIN

Project is funded by

Music moves Europe

The Project is funded by the European Union