



department for
**culture, media
and sport**

A survey of live music in England and Wales in 2007

Tim Hanson, Bruce Hayward and Andrew Phelps

BMRB Social Research

December 2007

improving
the quality
of life for all

The views expressed in this report are the authors' and do not necessarily reflect those of the Department for Culture, Media and Sport

BMRB Social would like to thank officials from the Department for Culture, Media and Sport and the Live Music Industry representatives for their advice and guidance throughout the duration of the project.

This report can be downloaded from the DCMS website:

www.culture.gov.uk/Reference_library/rands/research/

Table of Contents

1	Introduction	4
1.1	Policy and wider industry context.....	4
1.2	Survey aims.....	6
1.3	Survey method.....	7
1.4	Comparability between the 2007 and 2004 surveys	9
2	Summary of key findings.....	10
3	Provision of live music in the 12 months prior to interview	12
3.1	Incidence of live music provision in the 12 months prior to interview	12
3.2	Types of live music provided	20
3.3	Licensing arrangements for venues staging live music.....	23
4	Reasons for providing or not providing live music.....	25
4.1	Reasons for staging live music	26
4.2	Reasons for stopping live music.....	27
4.3	Reasons for venues never putting on live music.....	29
4.4	Current authorisation and future intentions to stage live music.....	30
5	Impact of the Licensing Act on the provision of live music.....	33
5.1	Authorisation to stage live music under new licensing arrangements	34
5.2	Why venues have started staging live music since the Act was introduced	36
5.3	Why venues have stopped staging live music since the Act was introduced	36
5.4	Perceptions of the impact of the Act on the staging of live music	37
5.5	Suggestions for improving the Licensing Act	45
6	Background findings	47
6.1	Policies in relation to live music	47
6.2	Number of areas used for live music performances and venue capacities	47
6.3	Knowledge of the Licensing Act	47
6.4	Welsh language music.....	48
6.5	Incidental music	48
6.6	Small venues 'exemption'	48
6.7	Impact of the smoking ban	49
6.8	Other forms of entertainment offered.....	50
Appendix A: Technical Appendix		52
1	Introduction.....	53
2	Sample design.....	54
2.1	Survey population	54
2.2	Sampling frames	55
2.3	Selection of sample.....	57
2.4	Interviews achieved	58
3	Questionnaire and piloting.....	59
3.1	Questionnaire drafting.....	59
3.2	First pilot stage	59
3.3	Second pilot stage	59
3.4	Screening questions.....	60
4	Fieldwork	61
5	Weighting and data processing	63
5.1	Weighting	63
5.1	Notes on the data	63
5.3	Statistical reliability	64
Appendix B: Questionnaire.....		66
Appendix C: <i>Taking Part</i> data		90

1 Introduction

This report presents the findings of a survey designed to measure the provision of live music in venues in England and Wales whose core business is not the staging of live music and to provide insight into the early effects of the Licensing Act 2003 on the staging of live music in these venues. The survey was conducted by the British Market Research Bureau (BMRB) for the Department for Culture, Media and Sport (DCMS). The research builds on a baseline study carried out by Ipsos-MORI in 2004 prior to the introduction of the new Licensing Act.

1.1 Policy and wider industry context

The Licensing Act 2003 was introduced in November 2005 and represented the biggest reform in licensing law for 40 years, impacting on some 200,000 organisations and affecting most people in England and Wales. The Act brought together under a single licensing regime a range of activities previously subject to separate regimes (the sale and supply of alcohol, the provision of 'regulated entertainment' and the provision of late night refreshment). The Act was designed to bring with it a range of social, cultural and economic benefits and to strike a balance between safeguarding communities against crime, disorder and public nuisance, and giving more freedom and choice in the way people spend their leisure time.

The Government hoped the new regime would make it easier to put on live music through needing only a single licence to cover alcohol sales and all forms of regulated entertainment, rather than several different permissions. The forms, licence fees and other details were set nationally, removing local variations which had seen significant differences between the fees charged in some areas for a public entertainment licence under the old regime. Unlike the old regimes, there is no licence renewal process so, once granted, the licence and its permissions remain in force as long as required (unless problems occur on the premises).

As a significant reform, the proposed changes were greeted with uncertainty and concern from many of those who would be affected by them. While one of the aims of reform was the further development of culture, including live music, some in the music community were concerned about the possible impact of the new legislation. A key issue was the ending of the exemption whereby a premises licensed for the on-sale of alcohol could put on a maximum of two live music performers without requiring a public entertainment licence (the 'two in a bar' rule). The Government hoped this would remove the disincentive to put on more than two musicians, while some in the live music sector were concerned it would have a negative impact on smaller, ad hoc events. The Government made some adjustments to its proposals and made a commitment to undertake independent monitoring and evaluation of the impact of the Licensing Act 2003 on the performance of live music.

In 2004 DCMS, the government department responsible for setting the framework of licensing law, established the Live Music Forum (LMF), with representation from the music industry, Arts Council England, grass roots music organisations, local authorities, small venue operators and Government. Its remit was to monitor and evaluate the impact of the new Licensing Act on live music and to promote the take-up of reforms in the Act relating to the performance of live music.

The LMF and DCMS jointly commissioned research in 2004 to establish a baseline measure of the extent and frequency of live music staged on licensed premises before the Licensing Act came into force¹; and a further study in 2006 focusing on the experiences of smaller

¹ A Survey of live music staged in England and Wales in 2003/4:
<http://www.culture.gov.uk/NR/rdonlyres/85EDED0B-A8E3-4674-9C99-62C1CC97AFFC/0/livemusicsurvey.pdf>

venues in applying for new licenses following the introduction of the Act². The LMF disbanded in summer 2007 having reported its findings and recommendations to DCMS.

The LMF concluded in its final report that the Licensing Act 2003 has had a broadly neutral impact on the provision of live music. It also found nothing to substantiate the view that one particular type or style of live music, or indeed any particular style of venue, has been any more affected than any other by the new legislation. The report stressed that many of the benefits the Government believed the new legislation would bring to live music have been delivered, and the vast majority of local authorities were acting in a positive manner when dealing with applications for live music. The Forum did however conclude that there was no evidence that the Act has led to an increase in live music as the Government had hoped. The Forum also remained concerned about a small number of authorities which they feared had been overly restrictive, and felt licensing had been particularly burdensome for some smaller events. Finally, the report recommended that monitoring of the Licensing Act Review process should continue so that a fuller assessment can be made in the future of any possible impacts, and suggested the 2007 survey would provide an opportunity to begin this process³.

All of the recent research into the impact of the Licensing Act on live music has been conducted against a backdrop of an apparently thriving live music scene in England and Wales. Stuart Galbriath, the UK Managing Director of live entertainment company Live Nation, was recently reported as saying: "The UK live music scene is more buoyant now than I can ever remember it"⁴. This view is further evidenced by the hundreds of new music festivals that have set-up in recent years. Leonie Cooper wrote in *The Guardian* at the start of the 2007 festival season that "since the millennium more and more music festivals have sprung up across the country, catering for each and every sub-genre of music". Cooper also observed that there were 413 festivals taking place in the UK in 2007, an average of nearly eight every weekend⁵. The Live Music Forum report also talks about the value of such festivals to the economy: for example the organisers of the 2005 Glastonbury Festival estimated that the 2005 Festival's impact on the local economy could be over £50 million⁶. A recent study by Mintel meanwhile indicates that, in 2007, the UK live music market will be worth an estimated £743 million in ticket sales alone, which is up by eight per cent on 2006⁷.

High levels of attendance at live music events also point to the health of the industry. The *Taking Part Study*⁸ conducted for DCMS asked all adults interviewed whether they had attended a live music event in the past 12 months. More than a quarter of adults (28 per cent) interviewed between July and October 2006 said they had attended a live music event in the past 12 months, a marginally greater proportion than at the same time the previous year (26 per cent). According to Mintel's surveys, the proportion of adults attending live music concerts grew by almost one-fifth between 2001 and 2006, from 32 per cent to 38 per cent.

² The experience of smaller establishments in applying for live music authorisation: <http://www.culture.gov.uk/NR/rdonlyres/B3D1FE82-0F58-445B-9B4F-C4602AB35B09/0/licensingsurvey2006reportFinal.pdf>

³ Live Music Forum findings and recommendations: <http://www.culture.gov.uk/NR/rdonlyres/3B2586BD-7CD8-426F-AD4D-72087EEC4725/0/LiveMusicForum2007.rtf>

⁴ Taken from a BBC news article in April 2007, 'Golden Age for live music scene': <http://news.bbc.co.uk/1/hi/entertainment/6542871.stm>

⁵ 'Far from the muddy crowds': <http://arts.guardian.co.uk/festivals/story/0,,2114564,00.html>

⁶ www.glastonburyfestivals.co.uk

⁷ Mintel report, Live Entertainment 2007.

⁸ Data from *Taking Part* is included in Appendix C. Further information on *Taking Part* is available on the DCMS website (www.dcms.gov.uk)

For the purposes of this report, attendance at live music events is split between attendance at 'primary' live music venues and 'secondary' live music venues. Primary live music venues are venues whose core business is the staging of live music. Secondary live music venues are venues for whom live music is not the core business. In 2006, *Taking Part* found that three fifths of those who attended a live music event in the past 12 months had been to a primary live music venue (61 per cent) while 52 per cent of those who attended a live music event had been to a secondary live music venue. In 2005 the proportion who had attended an event at a primary live music venue was slightly lower than the 2006 level (57 per cent) while the proportion who had attended a secondary live music venue was slightly higher than the 2006 level (57 per cent). This may suggest that there has been a small shift away from live music at secondary venues to larger primary venues but it is not possible to firmly conclude this without further monitoring of trends.

The secondary live music venues with the highest levels of attendance in 2006 were pubs (where 33 per cent of those who had attended an event in the past 12 months had been to see live music) and small clubs (22 per cent). One in ten (10 per cent) of the live music attending population had been to an event at a church hall or community centre, while nine per cent had attended a private club or association to see live music. Six per cent had been to a restaurant or café for live music while five per cent had attended a student union and four per cent a hotel for live music in the previous 12 months.

The 2007 Survey of Live Music in England and Wales focused specifically on the experiences of secondary live music venues, as decisions to stage live music in these venues were felt to be potentially more susceptible to changes in licensing requirements.

1.2 Survey aims

The 2007 survey was designed to establish a measure of the number of premises regularly staging live music under the new licensing regime, to explore reasons why establishments do or do not stage live music and to assess the extent to which licensing arrangements are a significant factor in this decision-making. More specifically the key information requirements of the 2007 survey were to establish:

- the proportion of venues putting on live music;
- the proportion of venues putting on live music regularly;
- how these proportions have changed since 2004;
- the proportion of venues that have started or stopped putting on live music since the introduction of the Act;
- whether the Act has made any difference to the ease of staging live music.

1.3 Survey method

A detailed account of the survey method is provided in the technical appendix (Appendix A). A summary of the survey method is outlined in this section.

The survey was designed, as far as was practicable, to be comparable with the design of the 2004 baseline study. As in 2004, the target population for the survey was venues in England and Wales whose core business was not the staging of live music. Venues that staged live music as their core business – primary live music venues - were not included in the research. As a result, none of the findings discussed in this report relate to venues that stage live music as their core business. The specific types of venue included in the study were the following:

- Pubs and bars;
- small clubs;
- hotels and inns;
- restaurants and cafes;
- members' clubs and associations;
- student unions; and
- church halls and community centres.

These venues are referred to henceforth as 'secondary live music venues', that is, venues that have the potential to stage live music, but whose main business purpose is not the staging of live music.

As in 2004, the main sampling frame used for the survey was the Experian business database. This database was used to source samples of pubs and bars; small clubs; hotels and inns; restaurants and cafes; members' clubs and associations; and church halls⁹.

The sample of student unions was sourced from NUS Services, a branch of the National Union of Students (NUS) concerned with the commercial activities of student unions attached to higher education institutions.

The sample of community centres was compiled from a number of sources: a sample of urban community centres was drawn from a list held by Community Matters; a sample of rural village halls in England was compiled from websites of Rural Community Councils; and a sample of rural village halls in Wales was supplied by the Welsh Council for Voluntary Action.

Stratified random samples of each venue type were selected from the relevant database. For the most part, target issued sample sizes were set in proportion to the size of the relevant population. However, a degree of disproportionate sampling was introduced to ensure adequate coverage of specific groups within the overall sample, notably venues in Wales and student unions. At the fieldwork stage target quotas were set for the number of interviews to be achieved with each type of venue within country (England and Wales).

The questionnaire for the survey comprised questions from the baseline survey to enable comparisons to be drawn between the two surveys and new questions primarily exploring the perceived impact of the new Licensing Act on the staging of live music. The new questions were developed by BMRB in consultation with DCMS. The questionnaire was tested in a pilot survey in July 2007.

⁹ A sample of places of worship was obtained from the Experian database. Church halls were identified via a screening question at the start of the interview to establish whether places of worship had halls attached to them. Those that did not were excluded from the survey.

Main stage fieldwork for the survey was conducted between 30th July and 2nd September 2007. All interviews were carried out using computer-assisted telephone interviewing (CATI) by fully-trained telephone interviewers from the telephone division of Kantar Operations¹⁰. Interviews were conducted with the individual identified by each sampled establishment as being responsible for taking decisions about hosting live music or as having the most knowledge about any live music hosted by the venue. All fieldwork was conducted according to the Market Research Society Code of Conduct and to ISO20252 standards of supervision and quality control.

A total of 2,251 interviews was achieved. Figure 1.1 shows the breakdown of interviews by venue type compared with population estimates for each venue type in England and Wales. As the table shows, the proportions of interviews achieved by venue type were largely in line with the population profile. As discussed above, student unions were purposively over-sampled to enable separate analysis of these venues. The survey data were weighted at the analysis stage to correct for the disproportionate design and thus ensure that the sample for analysis was representative of the survey population by venue type and region.

Figure 1.1 – Number of interviews achieved by venue type and population figures

Venue type	Interviews achieved	per cent of total	Estimated population	per cent of total
Pubs and bars	760	33.8	52,660	35.2
Small clubs	102	4.5	6,247	4.2
Hotels and inns	203	9.0	13,189	8.8
Restaurants and cafes	377	16.7	29,309	19.6
Student Unions	49	2.2	170	0.1
Members' clubs and organisations	371	16.5	19,913	13.3
Church halls and community centres ¹¹	389	17.3	27,939	18.7
Total	2,251	100	149,427	100

¹⁰ Operational aspects of BMRB projects are handled by Kantar Operations, which was formed in 2004 following the merger of the operations capabilities of BMRB, Research International, Millward Brown and BPRI.

¹¹ The sample of church halls and community centres comprised 136 rural village halls, 95 urban community centres and 158 halls attached to places of worship.

1.4 Comparability between the 2007 and 2004 surveys

A number of caveats need to be borne in mind when interpreting the findings of this survey and drawing comparisons with the 2004 baseline survey.

The first concerns differences between the 2004 and 2007 surveys in terms of (a) the criteria used to define the survey populations for each of the seven venue types and (b) the estimates of the population sizes for each of the seven venue types. These differences mean that the profiles by venue type of the 2004 and 2007 samples differ to some extent. Since provision of live music varies by venue type, this in turn means that the two samples are not wholly comparable and that apparent differences between the findings might in part be explained by the differences in the profiles of the two samples. For example, restaurants and cafes accounted for a higher proportion of venues in 2007 than in 2004. Since restaurants and cafes are less likely than other venues to stage live music, the additional weight of these venues in the sample in 2007 has the effect of slightly reducing the overall proportion of venues providing live music¹².

A second caveat relates specifically to church halls and community centres. These venues were under-represented in the 2004 survey, with only 66 interviews conducted with respondents at these venues. Although the 2004 survey data were weighted at the analysis stage to reflect the actual population profile by venue type, the small base size for church halls and community centres in 2004 means that caution should be exercised when comparing results for these venues between the two surveys.

The third caveat relates to the fact that a significant proportion of respondents had been in post for a short period of time and in some cases had limited knowledge of the policy and practice of the venue in relation to live music prior to them taking up their position. The lack of knowledge among some respondents about their venue history was evidenced in a relatively high proportion of 'Don't know' responses to certain questions, for example in relation to when venues had started or stopped putting on live music. While this means that the survey cannot always provide a robust and complete picture of live music provision in venues, it should be noted that the 2004 survey was subject to the same limitations and so this particular shortcoming should not impact on comparisons between the two surveys.

Finally, it should be noted that differences between results in the 2004 and 2007 surveys may be due to random variation or wider trends in the industry or society, rather than simply or solely as a result of the introduction of the Licensing Act.

¹² The exact differences in population profiles between the 2004 and 2007 surveys are shown, with explanation, in Figure 2.2 of the technical appendix.

2 Summary of key findings

Changes in live music provision

- The 2007 survey findings show that there has been a five percentage point decrease in the provision of live music in secondary live music venues in England and Wales since the baseline survey was conducted in 2004. The proportion of venues that had staged live music in the 12 months prior to interview fell from 47 per cent in 2004 to 42 per cent in 2007.
- Among venues that had staged live music, the mean number of events staged was 22 in 2007, compared with 25 in 2004. Including venues that had put on no live music in the previous 12 months, the mean number of live music events staged in the previous 12 months fell from 12 in 2004 to nine in 2007.
- This decrease in the provision of live music was reflected in a decrease in the proportion of venues that had staged live music regularly¹³: 15 per cent of venues in the 2007 survey had staged live music regularly, compared with 19 per cent in 2004.
- While there has been a decrease in the provision of live music since 2004, this is largely explained by the decrease in provision in restaurants and cafes and in church halls and community centres, which between them account for just under 40 per cent of all venues in the survey population. Among the restaurants and cafes the proportion of venues that had staged live music in the 12 months prior to interview fell from 28 per cent in 2004 to 16 per cent in 2007; among church halls and community centres, the equivalent proportion fell from 68 per cent in 2004 to 44 per cent in 2007.
- If restaurants and cafes and church halls and community centres are excluded from the base of venues, the proportion of secondary live music venues putting on live music in the previous 12 months is in line with that recorded in 2004 (49 per cent in 2007 and 48 per cent in 2004), as is the mean number of live music events staged across all venues (12 in 2007 and 13 in 2004).
- In other types of venue, provision has been broadly stable, with the exception of small clubs, where provision has increased since 2004. Fifty-seven per cent of small clubs in the 2007 survey had staged live music in the 12 months prior to interview, compared with 42 per cent in 2004, while the mean number of events staged by small clubs increased from ten in 2004 to 14 in 2007.

Impact of the Licensing Act

- The Licensing Act does not appear to have been a major factor in decisions relating to whether or not secondary live music venues provide live music. This is best illustrated by the fact that only a small proportion of venues have started or stopped providing live music since the introduction of the Act and that very few of these venues cited the Act as a factor in their decisions to start or stop live music.
- Decisions on the staging of live music are driven primarily by commercial considerations, such as customer demand, cost-efficiency and fit with the nature of the business, as well as by practical considerations, in particular the suitability of the venue for staging live music. The most common reasons for staging or not staging live music remained largely unchanged since 2004.

¹³ Defined for the purposes of this survey as staging at least six live music events in the previous three months.

- Most secondary live music venues (72 per cent) felt the Act had made no difference to the ease of staging live music. Nine per cent felt the Act had made it easier for live music to be staged while the same proportion felt the Act had made it more difficult to stage live music.
- The large majority (74 per cent) of venues felt that the Licensing Act had had no overall impact on the staging of live music in their venue, while 12 per cent thought that it had had a positive impact and nine per cent that it had had a negative impact.

The future of live music

- Two thirds of all secondary live music venues (64 per cent) said that their premises licence permitted them to stage live music. Half of the venues (50 per cent) that had not staged live music in the previous 12 months said that their current licence *did* permit them to stage live music.
- Four in ten venues not regularly staging live music said they would consider doing so in the future (39 per cent). That equates to more than a fifth (22 per cent) of all venues in the survey, suggesting the possibility of substantial future growth in the proportion of venues staging live music.

3 Provision of live music in the 12 months prior to interview

Among the key aims of the survey were to measure the extent and nature of live music provision in secondary live music venues in England and Wales; to determine differences by venue type and region; and to assess changes in provision since 2004. This chapter of the report focuses on the findings relating to these aims.

3.1 Incidence of live music provision in the 12 months prior to interview

Respondents were asked whether any live music had been played or performed in their venue over the course of the previous 12 months. As in 2004, live music was defined to the respondent as “music performed in public by at least one person in real time, that is, not pre-recorded”¹⁴.

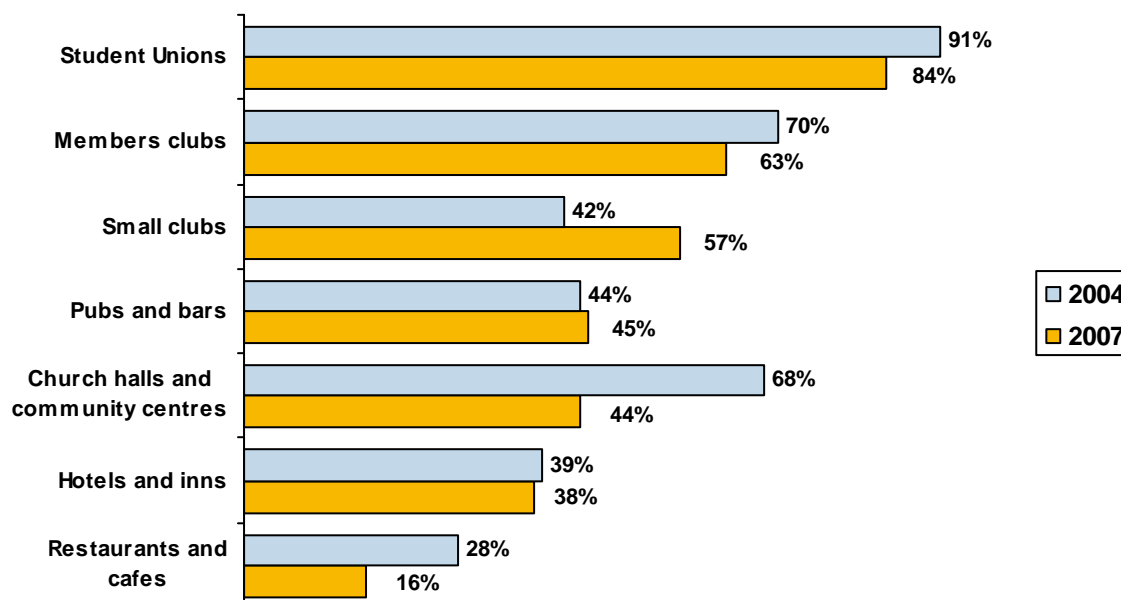
The 2007 survey indicates that the proportion of secondary live music venues staging live music has decreased since the baseline survey was conducted in 2004. Overall, 42 per cent of venues had put on live music in the previous 12 months, compared with 47 per cent in 2004.

Figure 3.1 shows how the proportion of secondary live music venues staging live music in the previous 12 months varied by type of venue. As was found in 2004, the proportion of venues providing live music in the previous 12 months varied considerably by venue type, ranging from 16 per cent of restaurants and cafes to 84 per cent of student unions.

Figure 3.1 – Live music provision by venue type

Question: Has there been any live music played or performed in your venue over the course of the past 12 months?

Base: All respondents (2004 = 1,577 venues, 2007 = 2,251 venues)



¹⁴ As in 2004, respondents were given no further guidance as to what counted as ‘live music’. In the 2007 survey respondents were later asked whether they had included events that only consisted of DJs and/or karaoke. Small proportions of respondents did include some of these events (five per cent included DJ only events, 13 per cent included karaoke only events). Church halls were also asked whether they included events that were part of religious services and around half (48 per cent) said they had included some of these events. While the inclusion of these events was not measured in 2004 it can be assumed that similar proportions were included then – as live music was defined in the same way on both surveys – so comparisons between 2004 and 2007 are still valid.

The overall decrease in levels of provision of live music was reflected in a decrease among some, but not all, of the individual venue types. There were notable decreases in the proportion of venues staging live music among both church halls and community centres¹⁵ (from 68 per cent in 2004 to 44 per cent in 2007¹⁶) and restaurants and cafes (from 28 per cent to 16 per cent). The proportions of student unions and members clubs staging live music were slightly lower than in 2004, while the findings for pubs and clubs and hotels and inns were similar to those recorded in the baseline survey. Small clubs, on the other hand, were more likely to have provided live music in 2007 than in 2004 (57 per cent, compared with 42 per cent).

Further analysis of these findings shows that the overall decrease in live music provision is, to a large extent, explained by the decrease in provision in church halls and community centres and restaurants and cafes. If these two categories of venue are excluded from the analysis, the overall picture is one of stability, with 49 per cent of secondary live music venues providing live music in the previous 12 months in 2007 and 48 per cent doing so in 2004.

¹⁵ Forty three per cent of church halls and community centres that did not stage live music in the past year were authorised to do so under their premises licence. This suggests that many of these venues have the ability to stage live music but have chosen not to provide it, at least in the last year.

¹⁶ Three specific types of venues were included under the broad description of 'church halls and community centres' (urban community centres, rural village halls and halls attached to places of worship). Among these specific venues there were small differences in the proportions that had provided live music: 37% of urban community centres had provided live music in the last 12 months compared with 44% of rural halls and 47% of halls attached to places of worship.

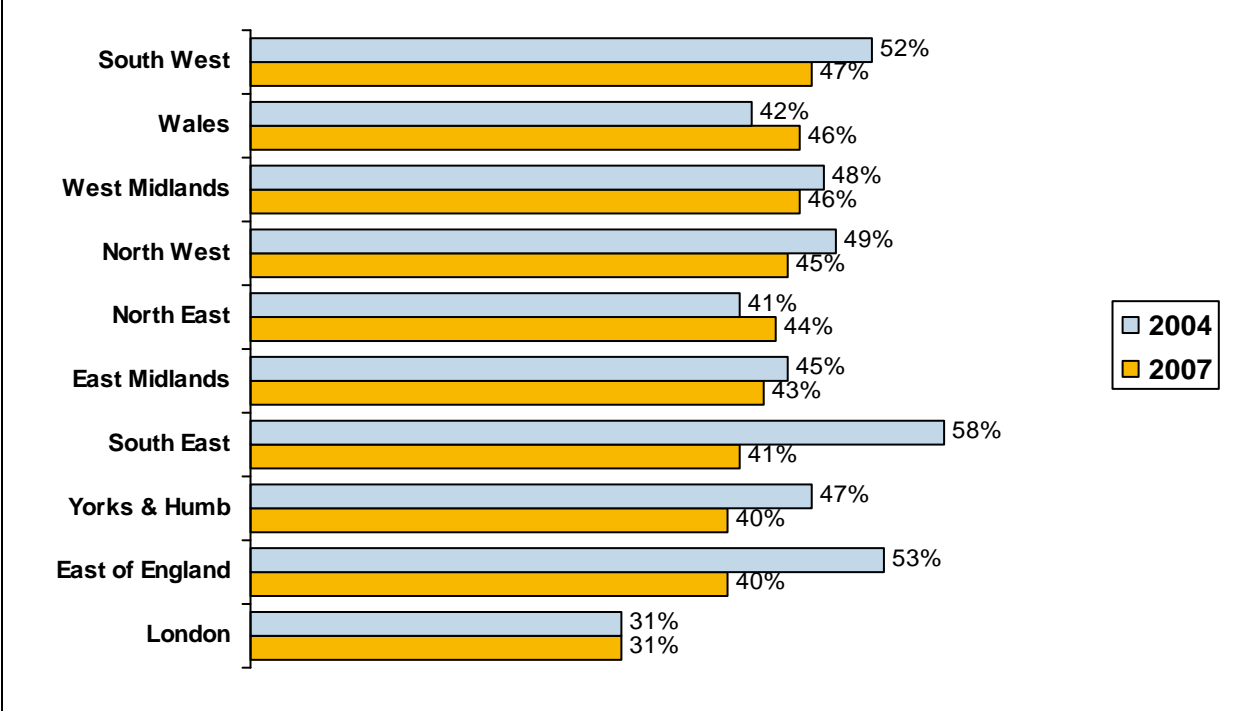
Figure 3.2 shows how the provision of live music varied by region. Provision was broadly similar across most regions, with the proportion of venues staging live music ranging from four in ten to just under a half. The one exception was London where a smaller proportion of venues (31 per cent) had staged live music in the previous 12 months. This difference is in part explained by the disproportionate number of restaurants and hotels (the venue types least likely to stage live music) in the sample of London venues when compared with other regions. Excluding restaurants and hotels from the analysis, 44 per cent of London venues had staged live music compared with 49 per cent of venues overall.

Across most regions the proportion of venues that had provided live music was broadly similar in 2004 and 2007. The exceptions to this rule were the South East, where the proportion had fallen from 58 per cent to 41 per cent and the East of England, where it had fallen from 53 per cent to 40 per cent. The 2006 Survey of the experiences of smaller establishments in applying for live music authorisation did not show any specific decrease in the proportion of licensed premises in these two regions¹⁷.

Figure 3.2 – Live music provision by region

Question: Has there been any live music played or performed in your venue over the course of the past 12 months?

Base: All respondents (2004 = 1,577 venues, 2007 = 2,251 venues)



Respondents in secondary live music venues that had staged live music in the previous year were asked how long they had been providing live music. More than half (56 per cent) had been staging live music for at least five years, while 18 per cent had been doing so for between two and five years and 22 per cent for less than two years. Members’ clubs, student unions and church halls and community centres tended to have been staging live music for longer than other types of venue, probably a reflection of the relative longevity of these types of venue. Conversely, restaurants and cafes had less history in terms of

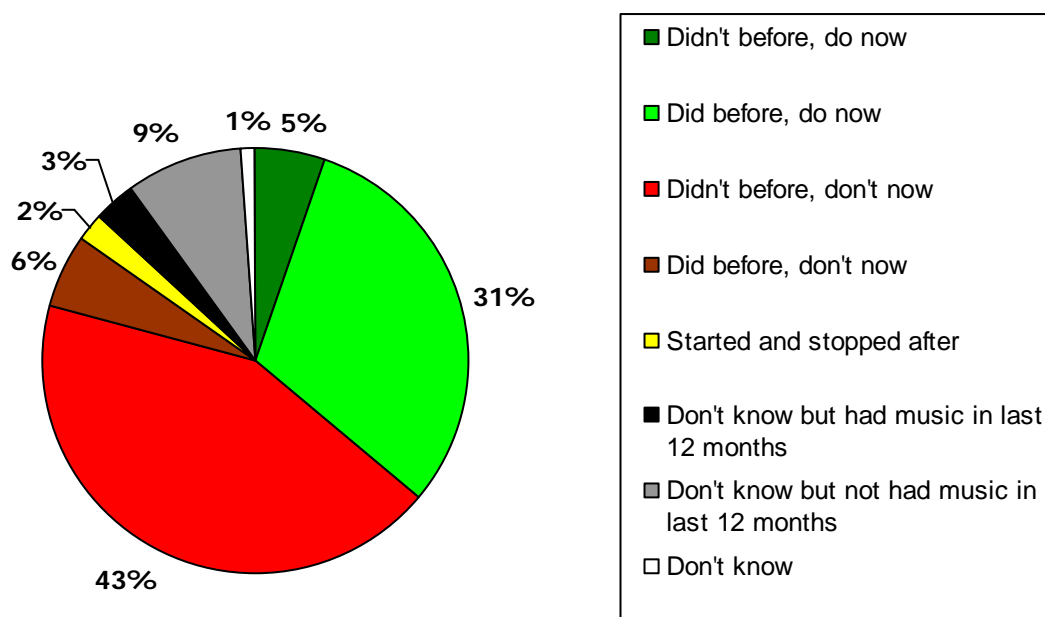
¹⁷ The 2006 survey found that 41 per cent of venues in the East of England and 45 per cent of venues in the South East had a Public Entertainment Licence (PEL) and now have a Premises Licence (PL) compared with an average of 44 per cent of venues across all regions. And 23 per cent of venues in the East of England and 29 per cent of venues in the South East did not have a PEL but do now have a PL compared with an average of 21 per cent across all regions.

staging live music: around a half of these venues said they had been putting live music on for less than two years. This finding points to the relatively transient nature of restaurants and cafes, which would result in more frequent changes in the profile of these venues compared with other types of establishments. And this may in turn go some way to explaining why the population of restaurants and cafes appears to be more likely to experience changes in live music provision compared with other types of venue.

In order to establish the extent to which venues had started or stopped staging live music since the introduction of the Licensing Act 2003, respondents were asked when they started putting on live music and (if applicable) when they stopped doing so. Figure 3.3 shows the proportion of venues that started or stopped putting on live music before and after 24th November 2005, the date when the Licensing Act 2003 came into effect. It should be noted that the picture is incomplete because a proportion of respondents were unable to say when the staging of live music started or stopped in their venue. Overall, however, the results show that the status of the majority of venues had remained unchanged since the introduction of the Act, with three in ten venues (31 per cent) staging live music both before the Act came into force and at the time of the interview, while 43 per cent did not stage live music before the introduction of the Act and were still not doing so at the time of the interview. Small, but similar proportions of venues had either started staging live music since the Act was introduced (seven per cent) or had stopped doing so (six per cent¹⁸). Among those venues that had started staging live music since the Act came into force, a minority had subsequently stopped doing so (two per cent).

Figure 3.3 – Status of venues in relation to offering live music before and after 24th November 2005

Base: All respondents (2,251 venues)



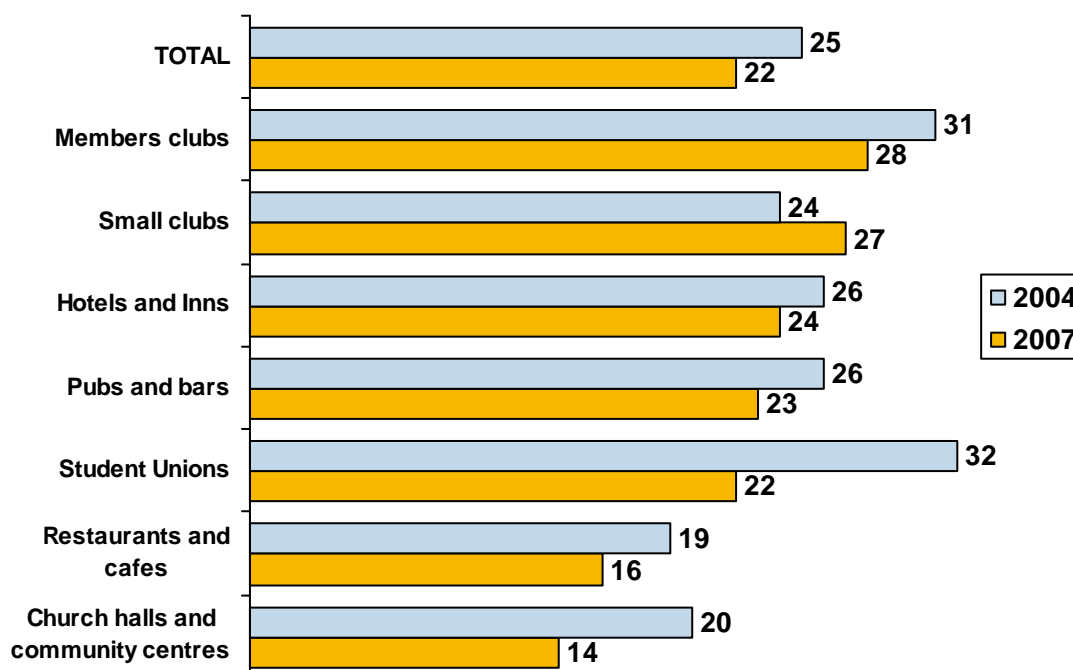
¹⁸ This equates to 132 venues. Only 20 of these venues said they had stopped putting on live music 'when the Licensing Act was introduced'. The majority (110 venues) had put on live music since the start of 2006 and had since stopped doing so.

Venues that had staged live music in the 12 months prior to interview were asked how many separate live music events, performances or sessions they had staged. Figure 3.4 shows the mean number of live events staged by these venues, analysed by type of venue.

Figure 3.4 – Average number of live music events in the last 12 months (among venues who have staged live music in the last 12 months)

Question: How many separate live music events, performances or sessions have there been, in total, in this venue during the past 12 months?

Base: All where venue has hosted live music in the last 12 months (2004 = 756 venues, 2007 = 989 venues)



Among venues that had put on live music events in the previous 12 months, the average number of events staged was 22. The average number of events staged ranged from 14 in church halls and community centres and 16 in restaurants and cafes to 27 in small clubs and 28 in members' clubs.

The average of 22 events was slightly lower than the average of 25 recorded in the 2004 survey. The key differences between the two surveys were that a smaller proportion of venues in 2004 had not put on any events (53 per cent, compared with 58 per cent in 2007) while a larger proportion had put on over 40 events (13 per cent, compared with 10 per cent in 2007). The number of events staged fell across most types of venue, with the most notable decreases being for student unions (from 32 to 22) and church halls and community centres (from 20 to 14). The exception to the rule was again small clubs where the average number of events increased from 24 in 2004 to 27 in 2007.

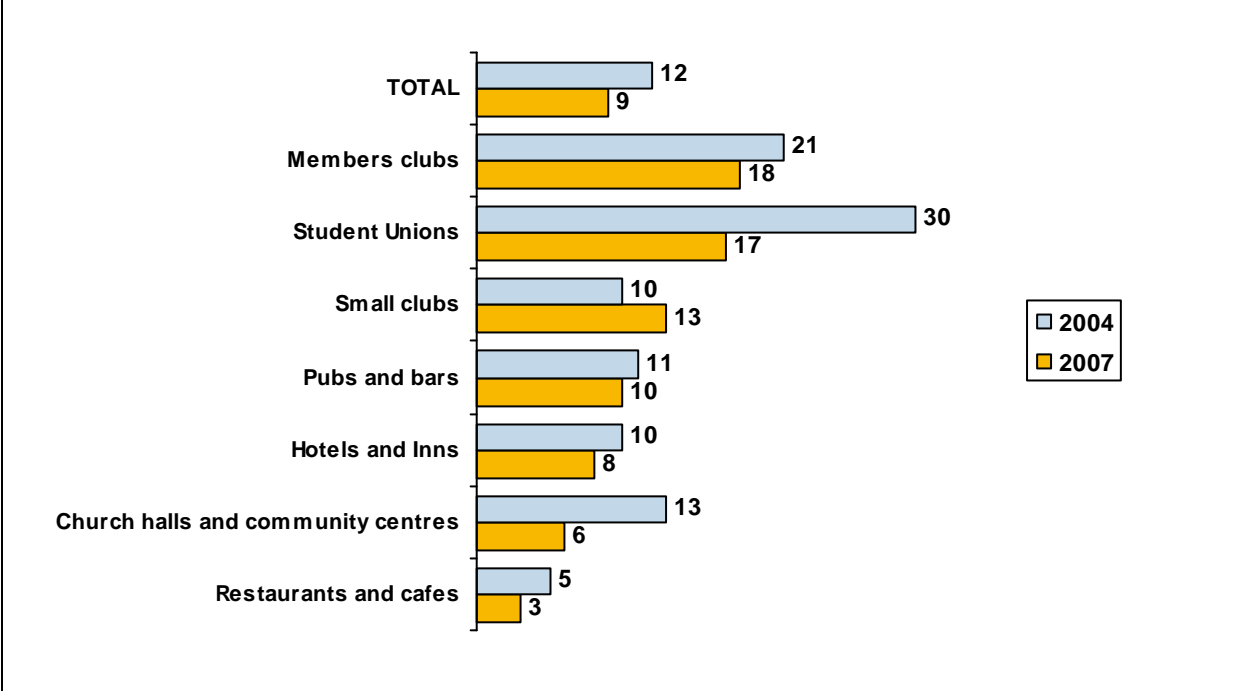
When venues that had not staged any live music over the previous 12 months are included in the calculation, the 2007 survey data again suggest a decrease in the provision of live music, with the number of events staged falling from an average of 12 per year in 2004 to an average of nine per year in 2007 (Figure 3.5). The average varied considerably by venue type, ranging from three in restaurants and cafes and six in church halls and community centres to 17 in students unions and 18 among members clubs. The largest decreases in provision were experienced by student unions, church halls and community

centres and restaurants and cafes, all categories where both the proportion of venues staging live music and the number of events staged by those that did put on live music had decreased since 2004. The only category of venue to register an increase in provision was small clubs (from ten events in 2004 to 13 in 2007). The overall decrease is again driven largely by restaurants and cafes and church halls and community centres. If these venues are excluded, the difference between the mean number of events staged in the last 12 months across the two surveys reduces (12 in 2007 and 13 in 2004).

Figure 3.5 – Average number of live music events in the last 12 months across ALL venues

Question: How many separate live music events, performances or sessions have there been, in total, in this venue during the past 12 months?

Base: All respondents (2004 = 1,577 venues, 2007 = 2,251 venues)

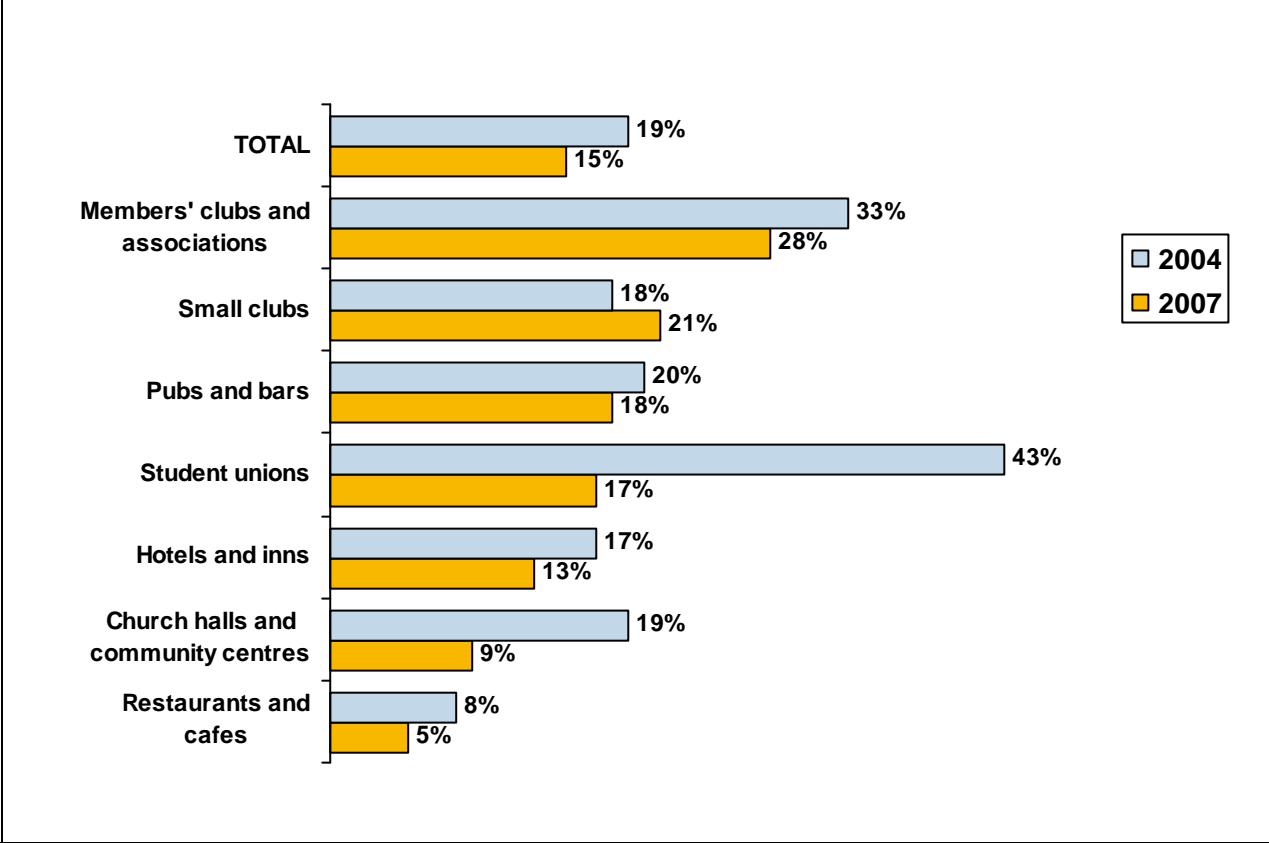


One of the key measures that the survey aimed to establish was the proportion of secondary live music venues putting on live music regularly, defined for the purposes of both the baseline and follow up surveys as staging at least six live music events in the three months prior to interview. As would be expected, given the overall decrease in the provision of live music since 2004, there was a decrease in the proportion of venues staging live music regularly, from 19 per cent in 2004 to 15 per cent in 2007. The most substantial decreases were again among student unions (43 per cent to 17 per cent) and church halls and community centres (19 per cent to nine per cent). It should be noted, however, that the scale of the decrease for student unions is likely to be at least partly explained by the fact that 2007 fieldwork took place in August, around a month later than the 2004 survey, with the result that a larger part of the three month reference period for this measure in 2007 would have fallen during summer holidays for students when events would be unlikely to be held.

Figure 3.6 – Proportion of venues staging live music regularly (6+ events in the previous three months)

Question: [Derived from] *And how many of those live music events, performances or sessions have there been, in total, in this venue during **the last three months**?*

Base: All respondents (2004 = 1,577 venues, 2007 = 2,251 venues)



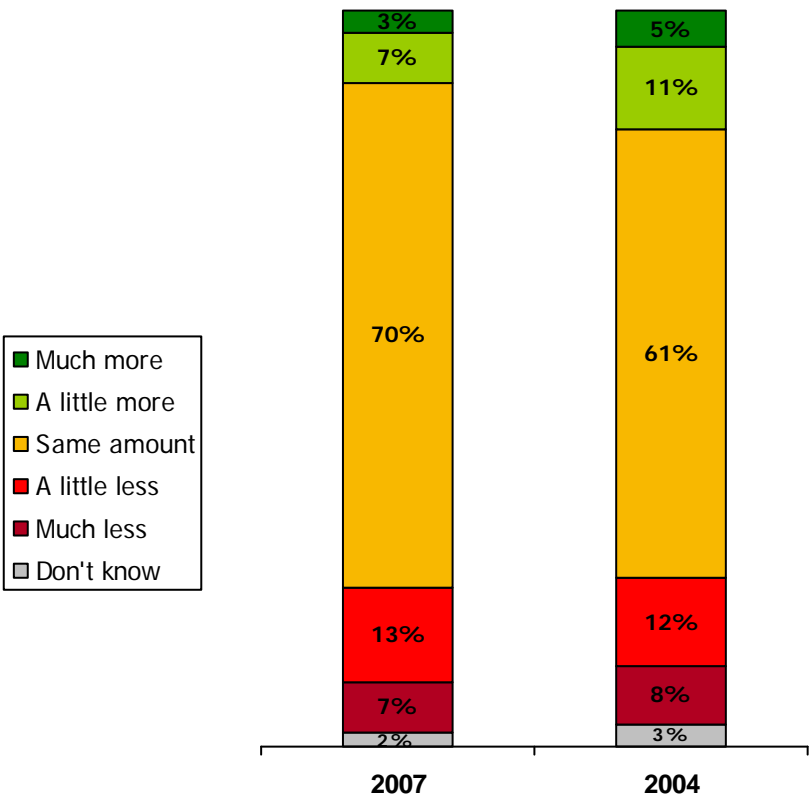
In both the 2004 and 2007 surveys venues that had been staging live music for at least a year were asked whether they were putting on more, less or the same number of live music events than at the same time the previous year (Figure 3.7). In 2007, whilst the majority of venues (70 per cent) reported no change in provision, venues were nearly twice as likely to say that they were staging less live music events than a year previously as they were to report that they were staging more (19 per cent and 10 per cent respectively), suggesting a net decrease in live music provision over the 12 months immediately preceding the survey fieldwork.

A similar pattern was evident in the 2004 survey (also shown in figure 3.7), with 16 per cent of venues saying that they were putting on more live music than at the same time a year previously and 21 per cent that they were putting on less. As was noted earlier, it is not possible to be certain about general trends based only on the results from two surveys, but this may suggest that there has been a gradual decrease in live music provision in secondary live music venues over the past few years.

Figure 3.7 – Whether venue had more, less or the same amount of live music compared with the same time last year

Question: In general, does your venue have more, less or the same number of live music events/sessions than this time last year?

Base: All venues that have been putting live music on for more than one year (2004 = 645 venues, 2007 = 707 venues)



3.2 Types of live music provided

All venues that had put on at least one live music event in the previous three months were asked what kinds of events they had put on from the following three options:

- Private functions (such as weddings, birthdays, etc);
- Events that were open to the public and free of charge;
- Events that were open to the public but for which there was a charge for entry.

Figure 3.8 shows the proportion of venues overall and by venue type that had staged at least one of each of these types of events in the previous three months.

Figure 3.8 – Types of events staged in the last 3 months

Question: And in the last three months, [for] how many of those live music events, performances or sessions were [was]...

a) ...private functions such as weddings, birthdays, etc?

b) ...open to the public and were free of charge?

c) ...there a charge made for entry?

Base: All venues that put on at least one event in the last 3 months (713 venues)

	Total	Pubs	Small clubs	Hotels	Restaurants and cafes	Members clubs	Student unions	Church halls and community centres
Base	713	282	38	59	39	180	28	106
	%	%	%	%	%	%	%	%
a) at least one private function	32	20	41	55	30	36	33	43
b) at least one free public event	68	92	36	62	75	50	33	38
c) at least one charged public event	26	10	65	16	16	42	67	39

Free public events were the most common type of event put on by secondary live music venues: two thirds (68 per cent) of all venues that had put on live music in the previous three months had put on at least one free public event. Around a third of venues (32 per cent) had put on a private function and a quarter (26 per cent) at least one public event with a charge for entry. There were some notable differences at this question by venue type, including the following:

- Hotels were more likely than all other venue types to put on private functions (55 per cent). Church halls and community centres (43 per cent) and small clubs (41 per cent) and were also more likely than average to stage these types of events.

- Pubs (92 per cent) and restaurants and cafes (75 per cent) were the venue types most likely to provide free public events. Church halls and community centres (38 per cent), small clubs (36 per cent) and student unions (33 per cent) were the venue types least likely to host free public events.
- Student unions (67 per cent) and small clubs (65 per cent) were the most likely venues to hold public events where a charge was made for entry. Members' clubs (42 per cent) and student unions (39 per cent) were also more likely than average to have staged these events. Hotels, restaurants and cafes and pubs were all considerably less likely to put on a live music event with a charge for entry.

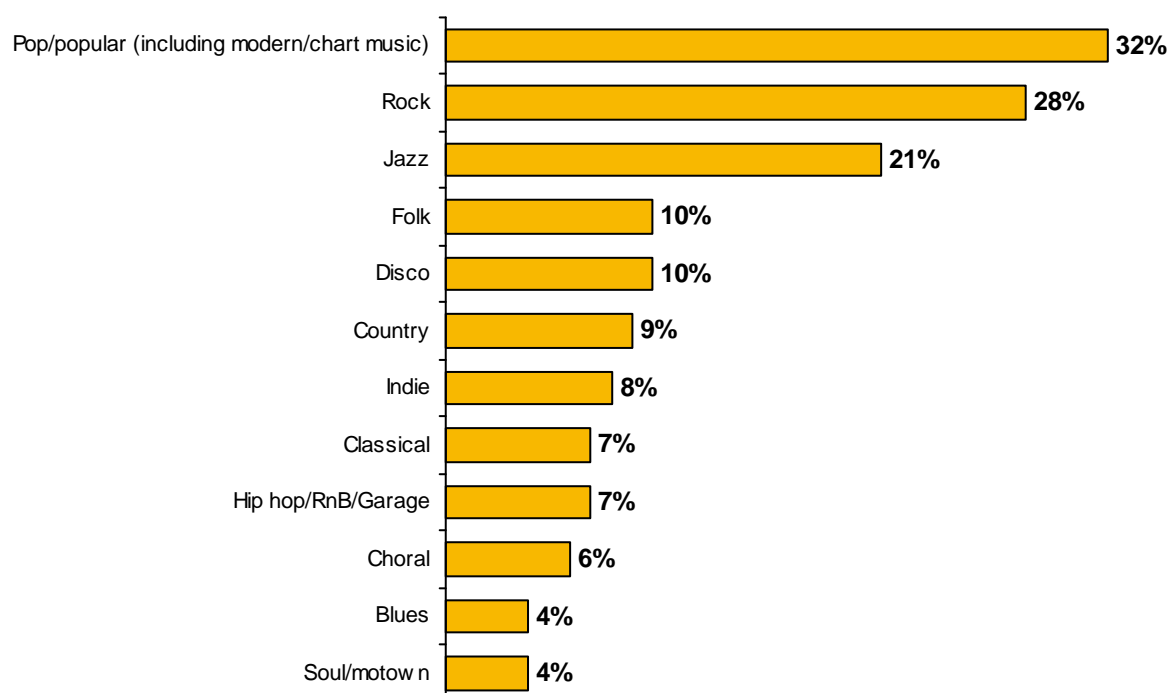
The proportions of venues staging public events had not changed notably since 2004. Among venues in the 2004 survey that had staged live music in the three months prior to interview, 64 per cent had put on free public events (compared with 68 per cent in 2007) and 25 per cent had staged public events with a charge for entry (26 per cent in 2007). However, there was a substantial decrease in the proportion of venues hosting private events between the two surveys: among venues that had put on events in the previous three months the proportion staging at least one private event had dropped by a third from 48 per cent in 2004 to 32 per cent in 2007. The proportion of venues hosting private events had decreased across all venue types with the exception of small clubs, where it had increased from 23 per cent to 41 per cent. The decreases were largest among pubs (from 38 per cent to 20 per cent), restaurants and cafes (from 48 per cent to 30 per cent) and members' clubs (from 58 per cent to 36 per cent).

Venues that had staged live music in the previous 12 months were asked what types of live music they had put on (Figure 3.9). The most common types of music staged were pop (32 per cent of venues), rock (28 per cent) and jazz (21 per cent).

Figure 3.9 – Types of live music put on at venues in past 12 months (unprompted)

Question: What types of live music have there been at your venue in the last year?

Base: All who put on live music in the past 12 months (989 venues)



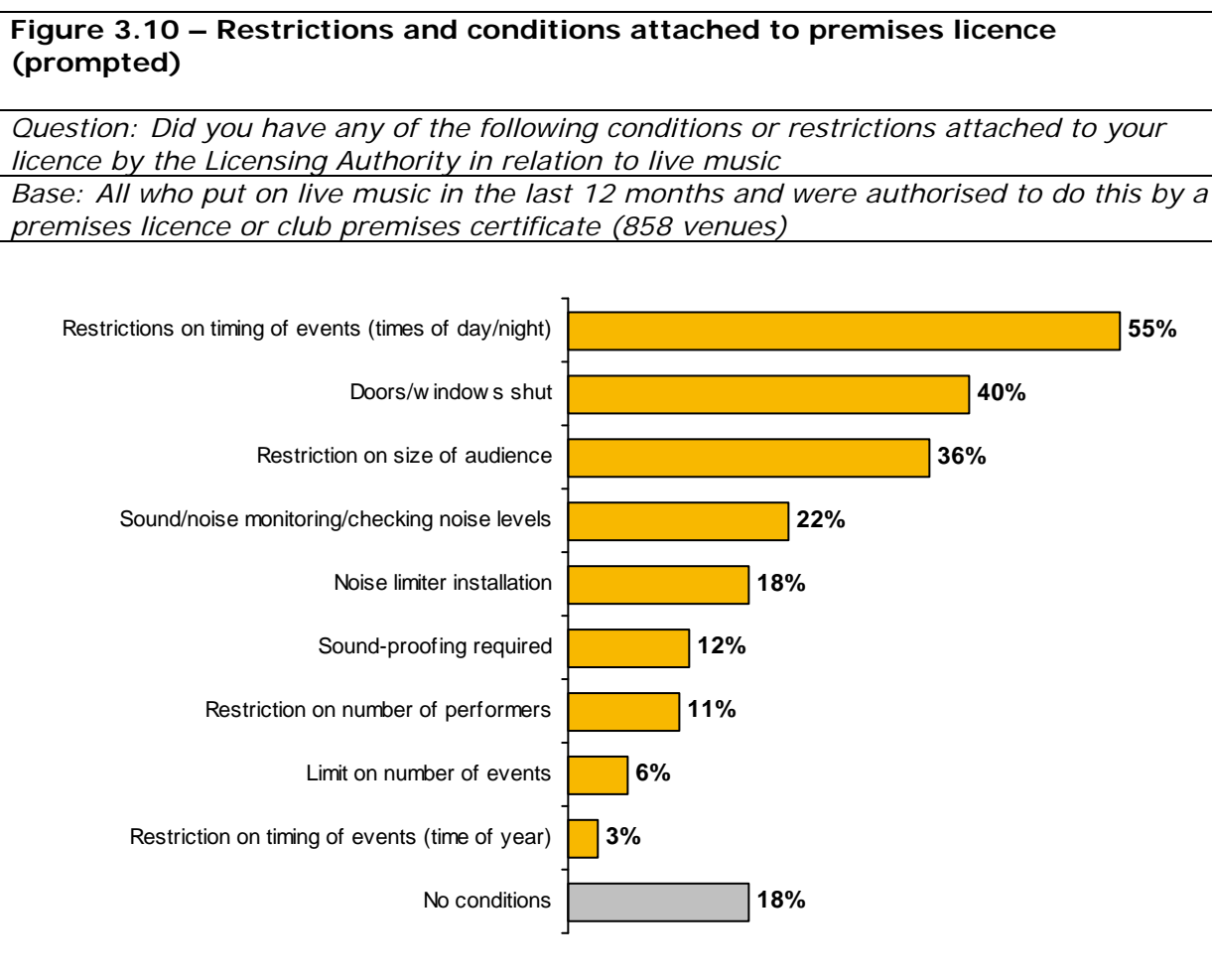
Other measures of the type and diversity of music that venues were staging suggested little change since 2004. The average range in terms of the number of musicians playing in bands was virtually unchanged since 2004 (1.6 – 6.5 in 2007, compared with 1.7 – 6.3 in 2004), as was the proportion of venues staging mostly amplified music (87 per cent in 2007 and 86 per cent in 2004). As in 2004, the large majority of venues put on live music events throughout the year, although the proportion that did so was somewhat lower than in 2004 (72 per cent, versus 85 per cent in 2004)¹⁹.

¹⁹ This difference may be at least partly explained by the fact that Christmas and New Year were included within the 'Winter' response code in 2007 but were not included in this code in 2004.

3.3 Licensing arrangements for venues staging live music

In the vast majority (86 per cent) of venues that had put on live music in the previous 12 months the staging of live music was authorised by a premises licence. One in ten respondents (10 per cent) said that they used temporary event notices (TENs) to stage live music, whilst five per cent said that they were exempt from licensing²⁰. A small proportion of respondents (three per cent) were unsure about the licensing arrangements for their venue. Rural village halls and urban community centres were particularly likely to use TENs: one in four rural halls (25 per cent) and one in six urban centres (17 per cent) said that their live music was authorised in this way.

Around eight in ten respondents in venues that staged live music under their premises licence said that their Licensing Authority had attached conditions or restrictions to their licence. As Figure 3.10 shows, the most common restrictions related to the timing of events, the size of audiences and limits on noise levels.



There were no significant differences by venue type in terms of whether venues had conditions attached to licences: around four fifths of each of the venue types said that they had some form of condition or restriction. There were, however, some differences in terms of the types of restriction in place at different types of venues, most notably the following:

- Small clubs were most likely to have noise restrictions. Two thirds of these venues (67 per cent) had noise restrictions compared with around half (51 per cent) of

²⁰ Around three quarters of the venues that stated they were exempt from licensing were church halls and community centres. In most cases respondents stated that they were exempt from licensing because the venue was associated with a place of worship.

venues overall. Church halls and community centres were the least likely to have noise restrictions (just 25 per cent had these attached to their licences).

- Church halls and community centres were most likely to have restrictions on the size of audiences (56 per cent, compared with 36 per cent overall). Hotels were least likely to have these restrictions (24 per cent).
- Church halls and community centres were slightly more likely than other venues to have timing restrictions attached to their licences (62 per cent compared with 56 per cent overall). Small clubs were least likely to have these restrictions on the timing of events (42 per cent).

There were some differences by region in terms of whether venues had conditions attached to licences. Venues in Yorkshire and Humberside (69 per cent had restrictions compared with 81 per cent overall) and the West Midlands (70 per cent had restrictions) were less likely than other regions to have conditions attached to licences. The region most likely to have restrictions was the South West, where nine in ten venues (91 per cent) said that they had some form of condition or restriction attached to their licence. Looking at the regions that experienced the biggest drops in live music provision, 87 per cent of South East venues and 75 per cent of venues in the East of England had restrictions or conditions attached to their licences.

4 Reasons for providing or not providing live music

This chapter examines why secondary live music venues do or do not provide live music, how likely venues that are not currently putting on live music are to do so in the future and what would encourage venues to stage live music – or more live music - in the future.

All venues where the respondent knew about previous live music provision are covered in this section, regardless of whether they were currently staging live music, previously staged live music but had stopped, or never staged live music. The following points set the context for this section by breaking down the current situation of all venues in relation to their provision of live music:

- 42 per cent of venues had staged a live music event in the 12 months prior to being interviewed;
- 15 per cent of venues were staging live music regularly (at least six times in the last 12 months);
- 13 per cent of venues had staged live music previously but not in the last 12 months;
- 39 per cent of venues were still staging live music at the time of being interviewed²¹;
- 40 per cent of venues had never staged live music.

The chapter focuses on the range of reasons that venues give for providing or not providing live music and not specifically on the role that licensing is seen to play in their decisions. Chapter 5 focuses more specifically on the impact of the Act and the extent to which decisions relating to the provision of live music have been influenced by its introduction.

²¹ This was derived by adding together those who had provided live music in the past 12 months and were still staging it and those who had not provided live music in the last 12 months but said they 'had not stopped'.

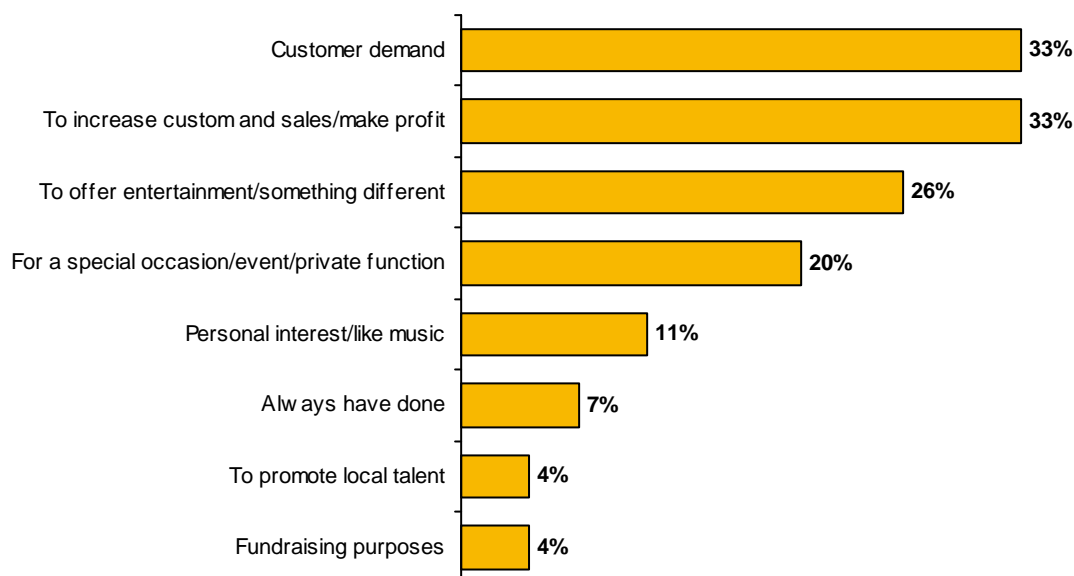
4.1 Reasons for staging live music

Venues that had put on live music in the previous 12 months were asked what their main reasons were for doing so. The most common reasons given are shown in Figure 4.1.

Figure 4.1 – Main reasons for providing live music (open response)

Question: What are the two or three main reasons that your venue has live music?

Base: All venues that have hosted live music in last 12 months (989 venues)



The findings suggest that the decision for venues to stage live music is frequently a commercial one, a third of respondents saying that the decision was to do with customer demand and the same proportion that it was a means of increasing custom and sales. Customer demand, to increase custom and sales and profit were also the most common reasons mentioned in the 2004 survey. Around a quarter of respondents said that they provided live music to offer entertainment or 'something different', whilst a fifth said that they staged events for special occasions or private functions. Hotels and inns were particularly likely to say that they provided live music as part of special events (37 per cent gave this as a reason for staging live music).

Around one in ten respondents stated that they put on live music through a personal interest in music, whilst smaller proportions cited more altruistic reasons for staging live music, such as to promote local talent or for fundraising purposes (each mentioned by four per cent). Fundraising was a much more important consideration for church hall and community centres than for other types of venue; 14 per cent of respondents representing these venues cited fundraising as a reason for hosting live music.

4.2 Reasons for stopping live music

Respondents in venues that had staged live music in the past, but not in the previous 12 months, were asked why they had stopped putting on live music. Around a fifth (22 per cent) of these respondents said that they had not made a conscious decision to stop staging live music, but had simply not hosted any live music events in the previous 12 months.

Respondents at church halls and community centres were considerably more likely than those at other venue types to say that they had not stopped providing live music, accounting for two thirds of those who gave this response. Indeed, 55 per cent of respondents representing church halls and community centres that had not provided live music in the last 12 months, but had done so previously, said that they had not stopped providing live music²². This suggests that the decrease in live music provision among these venues discussed in Chapter 3 may not be the result of a conscious decision to stop live music. When asked why they had not put any live music on in the last 12 months, a third of respondents at church halls and community centres (35 per cent) said it was because there was no call or demand for it, the most common response at this question²³.

Around one in ten venues in the sample had staged live music more than 12 months ago, but had since stopped doing so. The majority of these venues had provided live music on an occasional basis in the past, although around a third had staged live music at least once a month and one in six had done so at least once a week.

Venues that had stopped putting on live music gave a wide range of reasons for doing so (Figure 4.2). Commercial and financial considerations were again prominent, just as they were for venues that chose to stage live music. Around one in five respondents cited lack of customer demand and a similar proportion issues associated with cost and lack of profitability²⁴. Six per cent of this group of respondents – all of them restaurants and pubs – said that they had decided to stop providing live music because the venue wanted to concentrate on food. Nine of the thirteen venues to give this response were located in the South East region.

Other responses given included the venue being unsuitable for staging live music (15 per cent of respondents) and the fact that venues had only ever staged one-off or occasional events (11 per cent), pointing to the ad hoc basis on which some venues stage live music. The 2004 survey also found that venues being unsuitable and previously only staging one-off events were among the most common reasons for stopping live music, along with a lack of demand and cost factors.

Only one in ten venues that had stopped staging live music (around one per cent of all venues in the sample) specifically mentioned issues related to licensing as influencing their decision to stop, while seven per cent of respondents cited complaints from residents and four per cent a change of ownership of the venue.

Small base sizes mean that there is limited scope for analysis of reasons for stopping live music by venue type and region. However, restaurants and cafes and church halls and community centres did appear to be more likely to say that they had never had regular

²² Forty one out of the 74 church halls and community centres at this question said they 'had not stopped' putting on live music.

²³ Fourteen out of the 41 church halls and community centres at this question said it was because there was no call or demand for it.

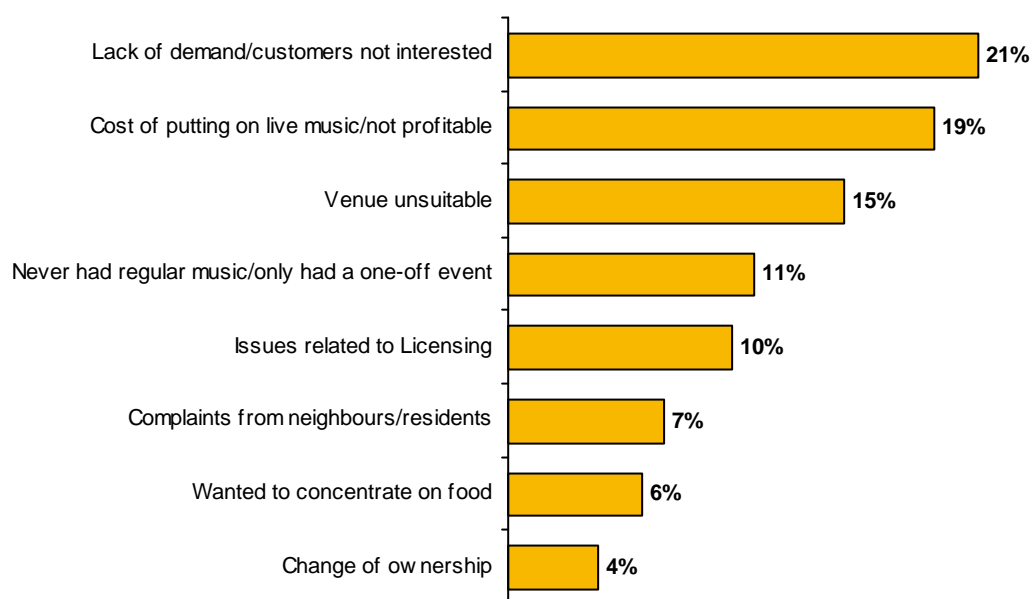
²⁴ These responses did not include specific mentions of the cost of licensing, which were included under the response code 'Issues related to licensing'.

music or only had one-off events when asked why they had stopped providing live music²⁵. The same pattern appears to have been evident for restaurants and cafes in the 2004 survey, with these venues more likely to say they only previously staged live music for a special or single occasion. Base sizes are too small to analyse responses from church halls and community centres at this question from the 2004 survey²⁶.

Figure 4.2 – Reasons for stopping live music (open response)

Question: For what reasons did the playing or performing of live music stop?

Base: All who have not put on live music in the last 12 months but have had it previously and did not say 'have not stopped' putting it on (221 venues)



²⁵ The total base at this question was 221 and included 25 restaurants and cafes and 33 church halls and community centres. One in four respondents at restaurants and cafes, and one in five at church halls and community centres, said that they had never had regular music, compared with one in ten overall.

²⁶ The total base at this question in 2004 was 181 and included 31 restaurants and cafes. Forty two per cent of restaurants and cafes said they only previously staged live music for a special or single occasion compared with 21 per cent of venues overall. Only six church halls and community centres were asked this question in the 2004 survey.

4.3 Reasons for venues never putting on live music

Four in ten venues in the survey had never put on any live music (40 per cent). For the most part these venues did not stage live music either because the venue was not suitable for doing so or because the provision of live music was not felt to be appropriate or desirable for the business – there was little evidence to suggest that the majority of these venues wanted to stage live music (Figure 4.3). This in turn suggests that a large proportion of secondary live music venues are unlikely to ever be in a position to stage live music, regardless of future levels of demand or interest in live music.

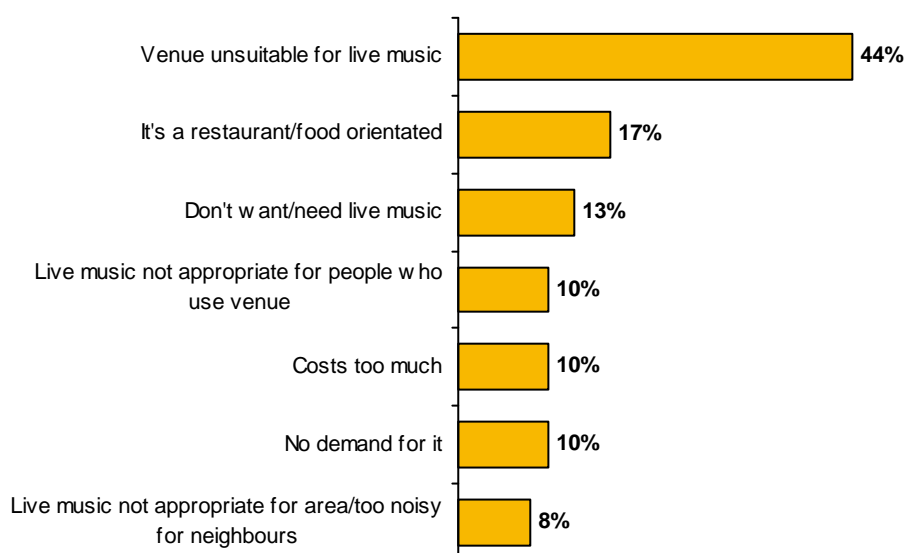
As was the case in the 2004 survey, the most common reasons given by these venues for not staging live music related to the suitability of the venue: more than four in ten venues that had never staged live music (44 per cent) said that their venue was unsuitable for staging live music. Hotels (56 per cent) and restaurants and cafes (50 per cent) were particularly likely to cite the lack of suitability of their venues as a reason for not providing live music.

The majority of other responses related to the fit of live music with the venue or business: 17 per cent said that their venue was a restaurant or food-orientated²⁷, one in ten (ten per cent) that live music was not appropriate for the people who used the venue, the same proportion that there was no customer demand for live music and eight per cent said it was not appropriate for the area or too noisy for the neighbours. Other responses included a lack of desire or need for live music (13 per cent) and financial considerations (ten per cent)²⁸. Church halls and community centres were particularly likely to cite lack of demand as a reason for not providing live music (some saying that live music would only be put on if a customer booked the venue for that purpose), while members' clubs were particularly likely to cite cost as a barrier to staging live music (24 per cent versus ten per cent of all venues).

Figure 4.3 – Reasons for never putting on live music (open response)

Question: Why do you not have live music in your venue?

Base: All who have never put on live music (858 venues)



²⁷ While this response was most common among restaurants (35 per cent mentioning it) it is notable that 15 per cent of pubs at this question said that their venue was food-orientated and therefore not appropriate for live music.

²⁸ Again venues coded here mentioned only the general cost of live music and nothing specific to licensing. Common responses were 'It's too expensive', 'Don't have the budget for it', 'It costs too much' and 'the cost of the musicians'.

4.4 Current authorisation and future intentions to stage live music

In order to explore the potential for secondary live music venues that were not currently staging live music to do so in the future, these venues were asked whether or not they were currently licensed to stage live music, whether they would consider doing so in the future and what would encourage them to do so. Venues that already staged live music were asked what would encourage them to increase their provision of live music.

Half of the venues (50 per cent) that had not staged live music in the previous twelve months²⁹ said that their current licence allowed them to stage live music. Venues that had put on live music in the past were particularly likely to have a current license authorising them to put on live music (71 per cent), although, even among those venues that had never staged live music, a reasonable proportion (41 per cent) said that they were licensed to do so. Forty three per cent of church halls and community centres that had not staged live music in the last 12 month said that their current premises licence allowed them to stage live music in their venue. A quarter (26 per cent) of the restaurants and cafes that had not staged live music in the previous 12 months said their current licence authorised the staging of live music.

Four in ten venues that did not currently stage live music (39 per cent) said that they would consider doing so in the future. This equates to just over a fifth (22 per cent) of all venues in the survey. Those venues that had previously staged live music were particularly likely to consider doing so in the future (64 per cent), although, again, even among those that had never put on live music three in ten (30 per cent) said that it would be something that they would consider in the future.

Among venues that did not hold a licence that covered the staging of live music, but said that they would consider putting on live music in the future (101 venues), the majority (62 per cent) said that they would use temporary event notices to license events, while 28 per cent said that they would vary their licence and two per cent that they would only stage incidental music and would therefore not require a licence.

Among those respondents who said that they would not consider staging live music in the future (713 venues), the reasons for this tended to echo the reasons that they had given for not offering live music at present – that their venue was not suitable (43 per cent), that live music did not fit with the business (15 per cent), that there was no demand for live music from their customers (15 per cent) or that it would not be a cost-effective option for them (nine per cent).

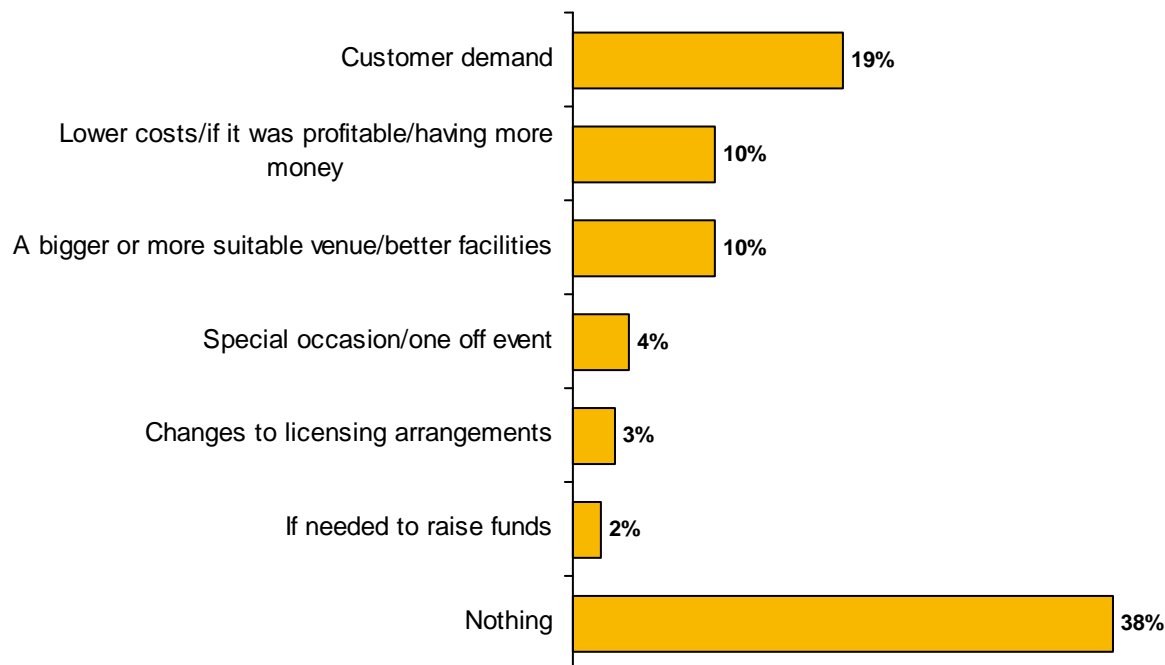
Irrespective of whether or not respondents had said that they would consider staging live music in the future, venues that had not staged live music in the 12 months prior to interview were asked what would encourage them to do so in the future (Figure 4.4).

²⁹ This includes both those that had and those that had not put on live music in the past (Base = 1,250).

Figure 4.4 – Things that would encourage venues to put on live music (open response)

Question: Aside from anything you have already mentioned, what would encourage you to put on live music in your venue?

Base: All who have not put live music on in the last 12 months (1,262 venues)



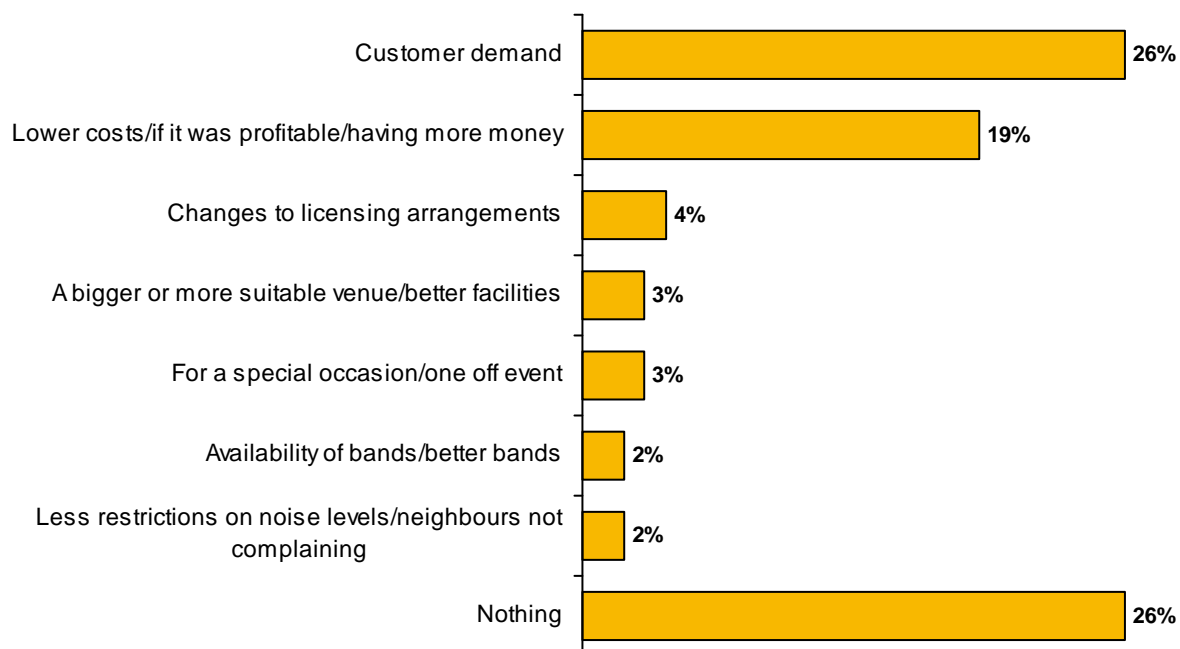
Nearly four in ten venues (38 per cent) that had not staged live music in the previous year said that nothing would encourage them to put on live music in the future. Not surprisingly, respondents who had previously said that they would not consider staging live music in the future were particularly likely to offer this response: 55 per cent of this group said that nothing would encourage them to put on live music compared with 16 per cent of those that would consider staging live music in the future. Where respondents did suggest criteria that would need to be met for them to consider staging live music, these tended to relate to the reasons that they had given for not currently offering live music, such as customer demand, financial considerations and having a suitable venue or facilities. A third of those who said they would consider putting on live music in the future (32 per cent) said that customer demand would encourage them to stage live music and this was comfortably the most common response among this group. Only three per cent of all respondents at this question made specific mention of licensing arrangements.

A similar picture emerges when looking at what respondents in venues that had put on live music in the previous 12 months said would encourage them to put on *more* live music (Figure 4.5). Customer demand and financial considerations were again the key criteria, while one in four respondents (26 per cent) said that nothing would encourage them to put on more live music than they did at present. Again, only a small proportion of respondents (four per cent) mentioned a change in licensing arrangements as a factor that would encourage them to increase their provision of live music.

Figure 4.5 – Things that would encourage venues to put on more live music (open response)

Question: Aside from anything you have already mentioned, what would encourage you to put on more live music in your venue?

Base: All who have put on live music in the last 12 months (989 venues)



5 Impact of the Licensing Act on the provision of live music

This chapter examines the role that respondents interviewed in the survey perceived the new Licensing Act to have had in relation to their willingness and ability to stage live music. The chapter begins by looking at the proportion of secondary live music venues that are permitted to stage live music under their premises licence. It then specifically explores whether the Licensing Act has influenced the decisions of individual venues in relation to the staging of live music; whether it was felt to have made it easier or more difficult for venues to stage live music; and what impact it had had on specific characteristics of the live events that venues staged. The chapter also examines respondents' perceptions of the overall impact of the Licensing Act on the staging of live music in their venue; the specific impact that it has had on venues that had operated under the 'two in a bar' exemption under the previous licensing regime; and the suggestions that respondents had for how the Licensing Act might be improved in relation to the staging of live music.

The questionnaire gave respondents ample opportunity to express their views on the impact of the Licensing Act, both via neutral open questions (e.g. 'why have you stopped putting on live music in your venue') and via direct open questions that asked specifically about the impact of the Act on decisions to stage live music. As such, any failure to find an effect of the Licensing Act on live music is more likely to be due to the fact that there hasn't been an effect, rather than a lack of sensitivity to any effect in the survey.

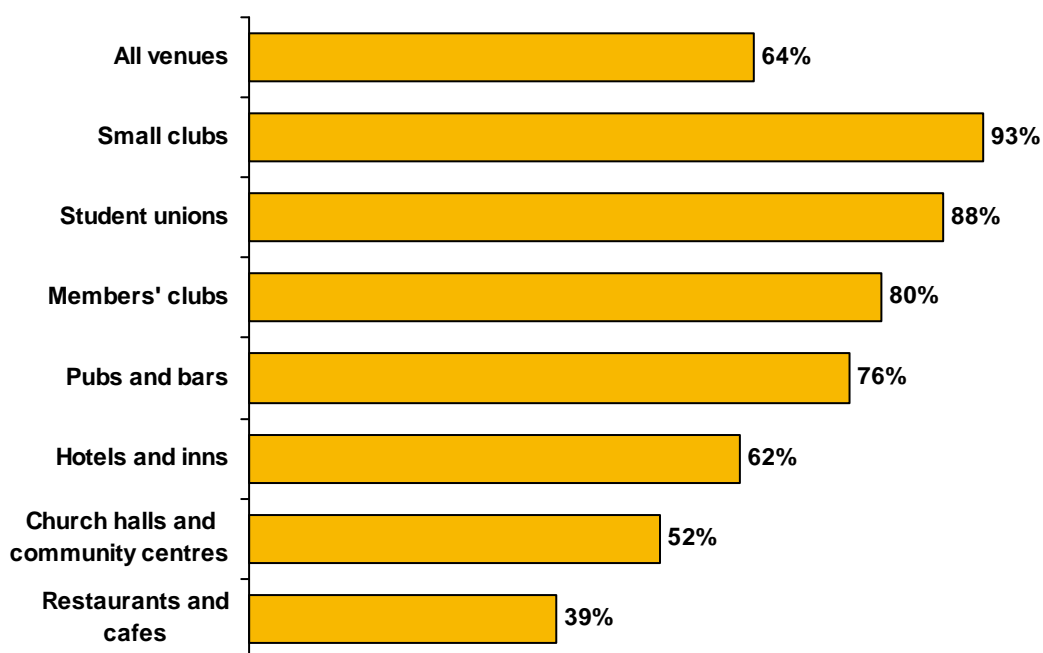
5.1 Authorisation to stage live music under new licensing arrangements

All venues were asked whether they had a premises licence that permitted them to stage live music, regardless of whether they had provided live music either in the past year or at any time in the past (Figure 5.1). Overall, two thirds of venues (64 per cent) said that they were permitted to stage live music under their current premises licence. Small clubs (93 per cent) and student unions (88 per cent) were most likely to have a premises licence with authorisation to stage live music while restaurants and cafes were least likely (39 per cent).

Figure 5.1 – Proportion of venues with authorisation to stage live music under premises licence

Question: May I check, how is the staging of live music in this venue authorised/does your current premises licence allow you to stage live music in this venue?

Base: All respondents (2,251 venues)



All respondents were also asked whether they had a Public Entertainment Licence (PEL) under the old licensing laws that authorised their establishment to stage live music. Half (50 per cent) said that they did have a PEL, while a further eight per cent said they staged live music under some other form of authorisation, such as the two in a bar exemption or a temporary public entertainment licence. One in five respondents (19 per cent) said they were unsure whether their venue had a PEL under the previous regime, in most cases because they had only been responsible for live music at their venue for a short period of time. The high proportion of respondents who were unsure of licensing arrangements under the previous regime makes it difficult to compare licensing authorisations under the two regimes.

It is however possible to make comparisons with the 2006 Survey of smaller establishments in applying for live music authorisation, which contained a very similar profile of venues to the 2007 survey. The 2006 survey also asked venues how they were authorised to stage live music prior to 24th November 2005³⁰ and found that three fifths of venues (60 per cent) were authorised to stage live music, either by having a PEL (45 per

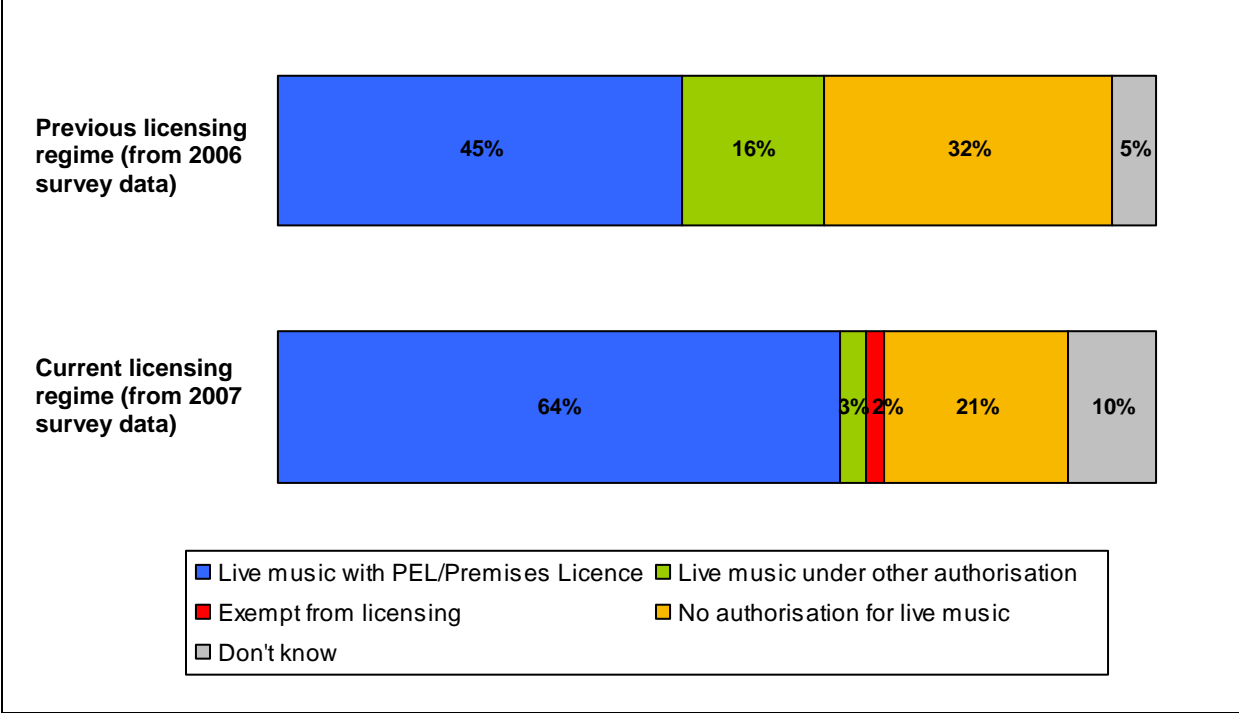
³⁰ The 2004 survey also asked this question but only asked it of venues that had provided live music in the previous 12 months.

cent) or through some other form of authorisation (16 per cent). The 2007 survey found that under the new regime two thirds of venues (64%) had a premises licence that authorised them to stage live music, with a further three per cent staging live music under another form of authorisation. Figure 5.2 shows the levels and types of authorisation to stage live music under the previous and current regimes.

Figure 5.2 – Comparison of music authorisations under previous and current licensing regimes³¹

[Derived from a range of questions in the 2006 survey that asked about live music authorisation under the previous regime and similar questions asked about the current regime in 2007]

Base: All respondents (2006: 2,101 venues, 2007: 2,251 venues)



³¹ Previous licensing regime data supplied by 2006 survey; current regime data supplied by 2007 survey. Venues in 2006 were not asked whether they were exempt from licensing. Some venues in 2007 said they staged live music with their premises licence *and* some other form of authorisation – these venues have been included in the 64 per cent that have live music included in their premises licence.

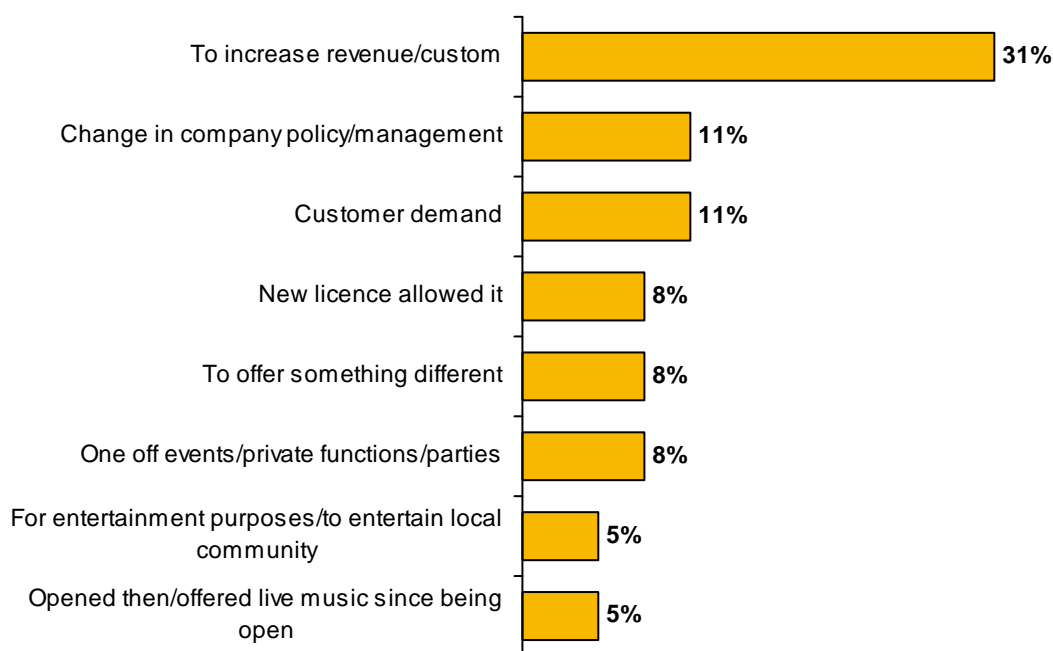
5.2 Why venues have started staging live music since the Act was introduced

Five per cent of all venues in the survey (110 venues) had started staging live music since the introduction of the Act and were still staging live music at the time of being interviewed. Figure 5.3 shows the most common reasons that these venues gave for starting to provide live music.

Figure 5.3 – Reasons for starting to staging live music since the introduction of the Act (open response)

Question: Why did your venue start putting on live music at this time?

Base: All who started putting on live music since the introduction of the Act and were still putting on live music at the time of being interviewed (110 venues)



As the previous chapter established, commercial considerations tend to dominate venues' decisions in relation to the staging of live music and the results here reinforce this finding. Around three in ten venues (31 per cent) started putting on live music to increase revenue or custom, with 11 per cent citing customer demand as influencing their decision and the same proportion saying that the decision to start staging live music followed a change in company policy or management. Only eight per cent of this group of venues said that they had started putting on live music since the introduction of the Act because their new licence allowed it.

5.3 Why venues have stopped staging live music since the Act was introduced

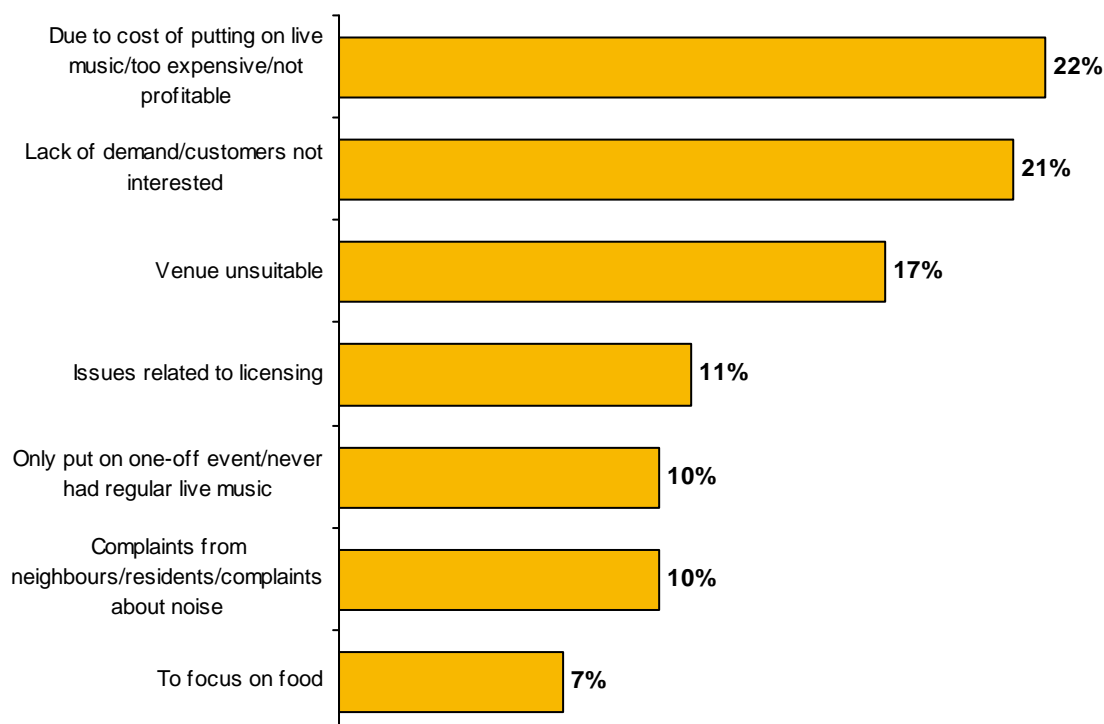
Six per cent of venues in the survey had stopped staging live music since the introduction of the Act (137 venues). However, the majority of these venues (61 per cent) had staged a live music event in the 12 months prior to being interviewed, suggesting that the introduction of the Act in November 2005 may not have been a factor in their decision to stop putting on live music. Figure 5.4 supports this view, showing that only 11 per cent of these venues spontaneously cited issues relating to licensing as influencing their decision to

stop, whilst commercial and practical considerations (cost-effectiveness; customer demand; and suitability of the venue) were again predominant in driving the decision to stop.

Figure 5.4 – Reasons that venues have stopped staging live music since the introduction of the Act (open response)

Question: For what reasons did the playing or performing of live music stop? / Why have you stopped putting on live music in your venue?

Base: All who have stopped putting on live music since the introduction of the Act (137 venues)



Venues that had stopped staging live music since the start of 2005 were also asked specifically whether the introduction of the new Licensing Act had contributed to their decision to stop staging live music and, if so, whether this was the main factor in their decision to stop staging live music³². Of the 227 venues that had stopped staging live music since the beginning of 2005, 14 per cent said that the introduction of the Act had influenced their decision to stop and nine per cent that the Act was the main reason behind the decision. Thus, for the large majority of venues that had stopped putting on live music in the period leading up to the introduction of the Act, and in the period following its introduction, the Licensing Act does not appear to have been a contributory factor in their decision.

5.4 Perceptions of the impact of the Act on the staging of live music

Respondents were asked a number of questions to establish their perceptions of how the new Licensing Act had impacted on the staging of live music in their venue.

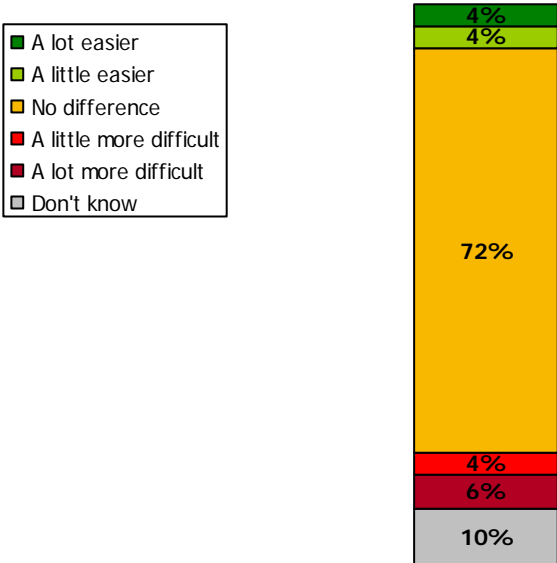
³² Venues that had stopped putting on live music in the months leading up to the introduction of the Act were also asked this question, on the basis that some might have made the decision to stop in anticipation of the new legislation being introduced.

Respondents were first asked whether they felt that the new Act had made it easier or more difficult for live music to be staged in their venue, or whether it had made no difference (Figure 5.5). The majority view was that the Act had been neutral in this respect, around seven in ten respondents (72 per cent) saying that the Act had made no difference in terms of how easy or difficult it was to stage live music in their venue. Similar proportions said that the Act had made the staging of music easier (nine per cent) and more difficult (also nine per cent), while one in ten (10 per cent) were unsure what impact the Act had had in terms of the staging of live music.

Figure 5.5 – Whether Licensing Act has made it easier or more difficult for live music to be staged in venues

Question: Would you say that, on the whole, the new Licensing Act has made it easier or more difficult for live music to be staged in this venue, or has it made no difference?

Base: All respondents (2,251 venues)



The view that the Act had been neutral in terms of how easy it was for venues to stage live music was predominant across all types of venue (Figure 5.6), although there were some differences in perceptions. Pubs and bars were more likely than other venue types to perceive the Licensing Act to have had some impact, whether positive or negative, and, together with hotels and inns, were more likely to think that the Act had made it easier for live music to be staged than to think it had made it more difficult. The opposite was true for members' clubs, restaurants and cafes and church halls and community centres. Venues that had put on live music in the previous 12 months were slightly more positive about the Act here than those that had previously staged live music but not in the past 12 months, although the majority of both groups felt the Act had made no difference.

Figure 5.6 – Impact of Act on ease of staging live music by venue type

Base: All respondents (2,251 venues)

Venue type	Made it easier	Made it more difficult	Made no difference
	%	%	%
Pubs and bars	15	10	66
Small clubs	7	8	78
Hotels and inns	9	6	77
Restaurants and cafes	5	8	71
Members' clubs	6	12	77
Student unions	8	10	76
Church halls and community centres	3	10	77
Venue status			
Live music in last 12 months	11	10	72
Live music before then	9	15	69
Never had live music	6	7	74

As well as asking about the impact of the Act on the general ease of staging live music, respondents were also asked to gauge the impact on more specific aspects of live music provision. These questions were asked only of venues that had been putting on live music for at least two years, in order to ensure that perceptions were grounded in actual experience pre- and post- the introduction of the Act. Respondents were asked whether they felt that the Act had had a positive or negative impact, or had had no impact, on the following aspects of live music:

- The number of events staged;
- The size of groups or number of musicians performing;
- The size of audiences;
- The number of acts performing per event;
- The diversity of acts performing or genres being performed.

As Figure 5.7 shows, few respondents perceived the Act to have had an impact on any of these aspects of live music events, with around nine in ten saying that the Act had made no difference for each aspect.

Figure 5.7 – Perceived impact of the Licensing Act on specific aspects of live music³³

Base: All venues that have been putting on live music for at least 2 years (747 venues)

	Number of events	Size of groups	Size of audiences	Number of acts per event	Diversity of acts/genres
	%	%	%	%	%
Positive³⁴	2	4	1	2	3
Neutral	89	89	90	91	93
Negative³⁵	5	2	4	4	2
Don't know	5	6	5	3	2

³³ Wherever respondents said that the Act had a positive or negative impact they were asked a follow-up question to assess whether this change had occurred specifically because of the Act or would have happened anyway. Those that said that the change would have happened anyway have been recorded as 'neutral' here since the question asked about the specific impact of the Act on the characteristics of live music events.

³⁴ E.g. if the Act has resulted in more events, more people in the groups that perform, etc.

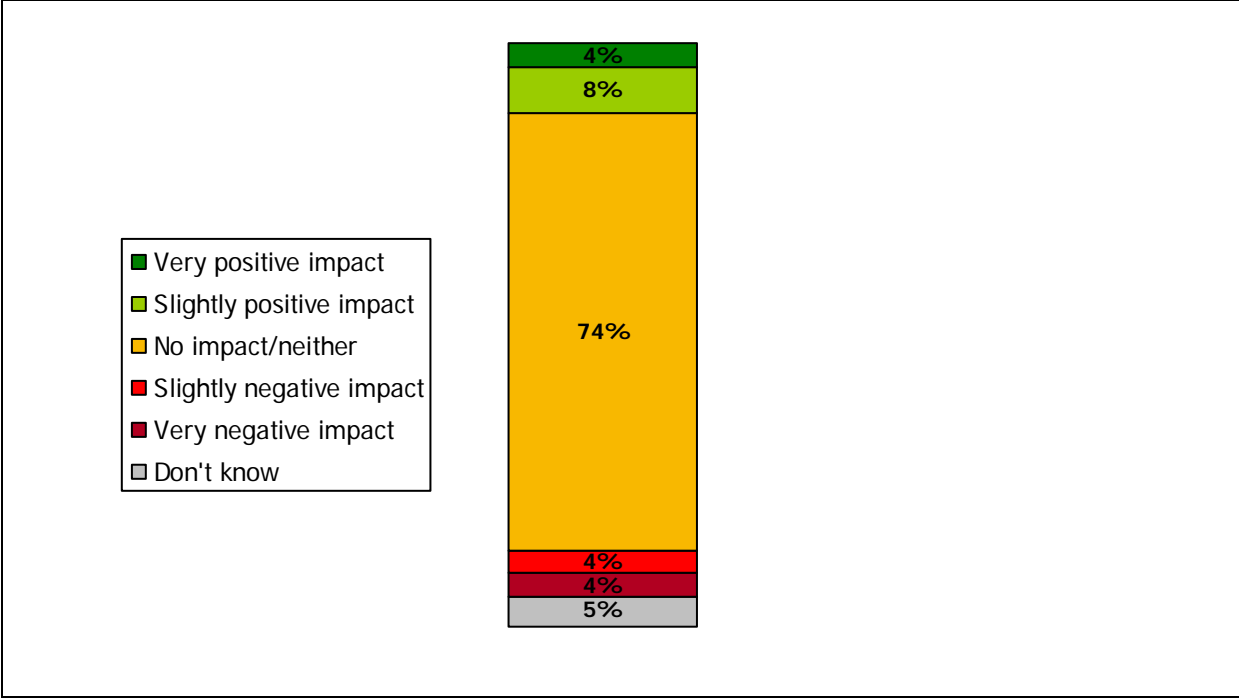
³⁵ E.g. if the Act has resulted in less events, less people in the groups that perform, etc.

Having been asked about the impact of the Act on specific aspects of the staging of live music in their venue, respondents were asked what they felt the overall impact of the Act had been on their venue's live music provision. This question was asked of all venues that had put on live music at any point in the past or would consider doing so in the future. As figure 5.8 shows, the predominant perception was that the introduction of the Act had been neutral in terms of its impact on venues' provision of live music. Three quarters of venues (74 per cent) felt that the Act had had no impact on the staging of live music, with twelve per cent saying that the Act had a positive impact and nine per cent that it had had a negative impact. The remaining five per cent of respondents were unable to comment on the overall impact of the Act on live music.

Figure 5.8 - Perceived overall impact of the Licensing Act on the staging of live music

Question: All things considered, would you say that the Licensing Act has had a positive impact, a negative impact or no impact at all on the staging of live music in your venue?

Base: All who have put on live music before or would consider doing so in the future (1,590 venues)



Perceptions again varied to some extent by type of venue, although the majority view was one of neutrality across all venue types (Figure 5.9). The balance of opinion was positive among pubs, restaurants, members clubs and student unions and negative among hotels, small clubs and church halls and community centres. The responses in Figure 5.9 bear little relation to the changes in provision among venue types that were discussed in Chapter 3. For example, small clubs were more likely to have provided live music in 2007 than in 2004, but more respondents in these venues felt the impact of the Act to have been negative than saw it as positive. Conversely, respondents in restaurants and cafes were twice as likely to feel that the impact of the Act had been positive than to perceive it as negative, yet live music provision in these venues fell by more than a third between 2004 and 2007. This again seems to reinforce the message that the Licensing Act has had little impact on changes in live music provision over the past three years.

Venues that had provided live music in the last 12 months were again more positive than those that had not put anything on in the last 12 months but had live music previously. Again, however, the majority of those in both groups felt the impact of the Act to be neutral, as was the case for those that had never staged live music.

Figure 5.9 – Whether Act has had a positive, negative or neutral impact on the staging of live music

Base: All who have ever staged live music or said they would consider it in the future (1,590 venues)

Venue type	Positive impact	Negative impact	No impact
	%	%	%
Pubs and bars	18	8	68
Small clubs	11	15	73
Hotels and inns	7	12	74
Restaurants and cafes	12	6	75
Members' clubs	12	9	75
Student unions	20	11	65
Church halls and community centres	6	9	82
Venue status			
Live music in last 12 months	14	9	73
Live music before then	10	14	73
Never had live music	9	5	78

Those who said that the Act had had a positive or negative impact on the staging of live music were asked why they thought that this was the case (Figure 5.10).

Respondents who felt that the Licensing Act had had a positive impact on the staging of live music (189 respondents) tended to cite reasons associated with the simplicity and clarity of the new Act as they saw it and the greater flexibility that it offered in terms of when they could stage live music and what type of acts they could put on. In terms of simplicity and clarity, 17 per cent of respondents said, without being specific, that the Act had made it easier to stage live music; ten per cent cited the fact that a range of activities were now covered under one licence; and seven per cent that the new Act made it clearer what they could and could not do in relation to the staging of live music. In relation to flexibility, 16 per cent of this group of respondents mentioned the relaxation of opening hours and eight per cent the fact that they were able to host a wider range of live music under the new Act.

Among those who felt that the Act had had a negative impact on the staging of live music (152 respondents), the main complaints centred on the restrictions or conditions that were imposed on them under the new Act (24 per cent); the increase in costs arising from the introduction of the Act (19 per cent); the administrative burden that the 'red tape' associated with licensing brought with it (15 per cent); and the 'hassle' involved in obtaining a licence and operating under the new regime (six per cent). Whilst clarity was seen as a benefit of the new Act by a small proportion of those who felt that the Act had been good for live music, a similar proportion of those who thought that the Act had impacted negatively on live music felt that it lacked clarity and was difficult to understand.

Figure 5.10 – Reasons for Act having a positive or negative impact (open response)

Positive	Negative
<ul style="list-style-type: none"> • Made it easier/simpler (17 per cent) • Can stay open later/more flexible opening hours/can have music later (16 per cent) • Now all covered by one licence (10 per cent) • Increase variety/scope of music venue can offer (8 per cent) • Clearer what you can and can't do (7 per cent) 	<ul style="list-style-type: none"> • Harsh restrictions/conditions put in place (24 per cent) • Increases cost (19 per cent) • Created more admin/red tape/increase bureaucracy (15 per cent) • Lack of clarity in Act/too difficult to understand (6 per cent) • Increases hassle (6 per cent)
<p><i>Base: All who think Act has had a positive impact (189 venues)</i></p>	<p><i>Base: All who think Act has had a negative impact (152 venues)</i></p>

One of the more controversial features of the Licensing Act was the removal of the so called 'Two in a bar' exemption which had allowed venues under the previous licensing regime to stage live music under certain circumstances without the need for a Public Entertainment Licence, provided that no more than two musicians performed at any one time. One of the aims of the 2007 survey was to elicit the perceptions of the Act of venues that had previously staged live music under 'Two in a bar' and to assess the impact of the Act on their staging of live music.

Only two per cent of respondents (representing 39 venues in total, of which 37 were pubs or bars) said that their venue had staged live music under the 'Two in a bar' exemption before the Act was introduced, compared with seven per cent of venues that said they were doing so in the 2004 survey. The figure of two per cent is likely to under-estimate the true proportion of venues that had operated under this exemption, arising perhaps because respondents who had not been in post under the previous regime were unaware of the previous licensing arrangements. It is notable in this context that only two of the 39 respondents who said that they had operated under 'Two in a bar' had been responsible for live music for less than two years at their venue, compared with 39 per cent of respondents across the whole sample.

Because the numbers of venues involved are relatively small, there is limited scope for detailed analysis of the perceptions of this group of venues and of the impact of the removal of the 'Two in a bar' exemption on their staging of live music. The findings outlined below should therefore be seen as indicative only.

Of the 39 venues that had previously operated under 'Two in a bar':

- 23 had put on live music in the previous 12 months, all of them under their current premises licence;
- Four out of the 23 said that they had restrictions on the number of performers;

- 11 of the 23 venues currently staging live music said that the Act had made no difference in terms of the how easy it was for them to stage live music, seven said that it had made things easier and five that it had made things more difficult;
- 14 of these 23 venues felt that the Act had had no overall impact on the staging of live music in their venue, six said that the impact had been positive and three felt it to have been negative;
- 17 of the 22 venues that had been putting on live music for at least two years said that the Act had made no difference to the number of performers in acts that they put on, whilst four said that the Act had resulted in them having more performers;
- 18 of the 22 venues that had been putting on live music for at least two years said that the Act had made no difference to the diversity of music offered, whilst three said that it had resulted in more diversity and one that it had resulted in less diversity;
- Ten of the 16 venues that had *not* put on live music in the previous 12 months said that the Act had made no difference in terms how easy it was for them to stage live music, three said that it had made it more difficult and two that had made it easier.
- 11 of these 16 venues felt that the Act had had no overall impact on the staging of live music in their venue, one said that the overall impact had been positive and two felt it to have been negative. The remaining respondent was unsure whether the overall impact had been positive or negative.

5.5 Suggestions for improving the Licensing Act

All venues that had previously put on live music – either in the previous 12 months or prior to that – were asked what they thought the Government could do to improve the Licensing Act in relation to live music in venues like their own. The most common responses are shown in Figure 5.11.

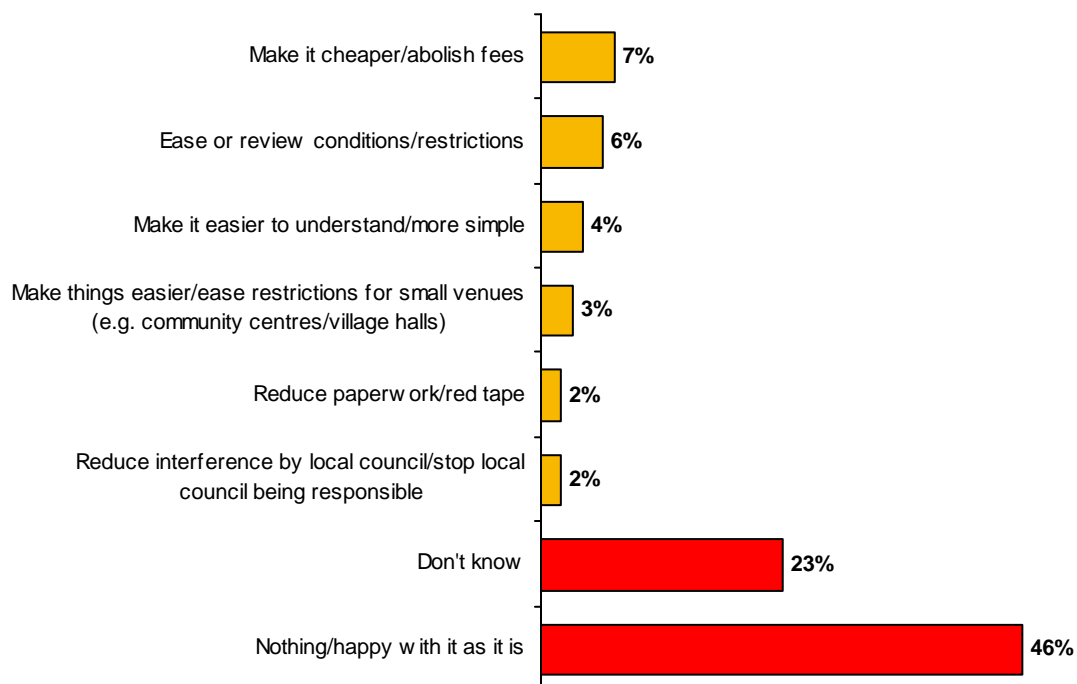
Just under half of respondents (46 per cent) said that nothing should be changed or that they were happy with the Act as it was, whilst a further quarter (23 per cent) said that they did not know what should be changed.

Where changes were suggested, these most commonly concerned reducing the costs or burdens associated with licensing. Seven per cent of respondents said that licensing should be made cheaper or that fees should be abolished and six per cent suggested easing or reviewing restrictions and conditions. The most common specific restriction mentioned here was the policy relating to doors and windows being shut, although there were also numerous mentions of being more flexible or lenient generally. The other most common suggestions were to simplify the Act or make it easier to understand (four per cent); to make things easier for smaller venues (three per cent); to reduce the amount of paperwork and red tape involved (two per cent); and to reduce interference by local councils or remove responsibility for licensing from them (two per cent).

Figure 5.11 – Suggestions for improving the Licensing Act in relation to staging live music (open response)

Question: Based on your knowledge and experience of the Licensing Act, what, if anything, do you think the Government could do to improve the Act in relation to the staging of live music in venues like yours?

Base: All who have previously put on live music (1,271 venues)



Numerous other suggestions were made for improving the Act by small numbers of respondents. These included the following, although each was mentioned by less than one per cent of respondents who were asked the question:

- Provide more information (17 venues)
- Extend/relax opening hours (15 venues)
- Favour venues ahead of local residents (13 venues)
- Streamline licensing laws/only have one licence to cover everything³⁶ (13 venues)
- Increase number of TENS/remove or relax TEN restrictions (13 venues)
- Clarify what counts as live music (11 venues)
- Reduce the time taken to apply for a licence (9 venues).

³⁶ While this was only mentioned by 13 venues it is nevertheless surprising as this was one of the key principles behind the Act.

6 Background findings

6.1 Policies in relation to live music

All venues were asked whether they were part of a group or chain of establishments and, if so, whether their group or chain had a policy in relation to the provision of live music. Six in ten venues (60 per cent) were not part of a group or chain of establishments. A fifth (21 per cent) of establishments were part of a group or chain, but did not have a policy on live music, 12 per cent were part of a group or chain of establishments that had a policy relating to the staging of live music and five per cent were part of a group or chain but did not know whether or not there was a policy in place.

Venues that were part of a group or chain with a policy (249 venues) were asked what the policy was, with responses as follows:

- Seven per cent of these 249 venues were required to have live music;
- Twenty-nine per cent were encouraged to have live music;
- Ten per cent were encouraged not to have live music;
- Twenty-three per cent were required not to have live music;
- Fourteen per cent said that decisions on the staging of live music were left to the discretion of individual venues.

6.2 Number of areas used for live music performances and venue capacities

Three quarters (74 per cent) of venues that had staged live music in the previous 12 months had only one area where live music could be performed. Eighteen per cent had two areas and six per cent had three or more. Church halls and community centres were most likely to only have one area (82 per cent had just one area) while small clubs (41 per cent had one area) and student unions (37 per cent had one area) were most likely to have more areas.

The survey also gathered information on the total capacity of venues³⁷ that had provided live music in the previous 12 months. Thirty eight per cent had capacities between 0 and 100, 30 per cent between 101 and 200 and the remaining 32 per cent had capacities in excess of 200. Student unions had the largest capacities with all but one of those that had put on live music in the previous 12 months (40 student unions) having a capacity of more than 200. The vast majority of small clubs (84 per cent) also had capacities in excess of 200. The only establishment type where more than half of the venues had capacities of 0-100 was restaurants and cafes, where 56 per cent had a total capacity of up to 100.

6.3 Knowledge of the Licensing Act

All respondents were asked how much they felt they knew about the Licensing Act³⁸. Responses at this question were as follows:

- 43 per cent said that they knew a lot about the Act;
- 31 per cent said that they knew a little;

³⁷ Including all areas for putting on live music.

³⁸ The question asked interviewees how much they felt they knew about all aspects of the Act and not just those related to live music.

- 12 per cent said that they did not know very much;
- 13 per cent said they hardly knew anything.

There were some differences at this question by venue type. Just 19 per cent of respondents representing church halls and community centres said that they knew 'a lot' about the Act, making them easily the least knowledgeable of all establishment types in relation to the Act. Respondents representing pubs (58 per cent of whom said that they knew 'a lot' about the Act), small clubs (55 per cent) and student unions (59 per cent) had the highest levels of knowledge here.

The finding that those representing church halls and community centres were least knowledgeable, alongside the fact that the proportion of live music events at these venues has dropped off somewhat since 2004, and that they are less positive than other venues about the impact of the Act, may suggest that more effort needs to be made to inform those responsible for live music at these venues about the Act and its benefits for them. However, 43 per cent of church halls and community centres that had not provided live music in the past 12 months said that their premises licence did permit them to stage live music in the 2007 survey. This perhaps suggests that the lack of knowledge among those responsible for live music at many of these venues does not impede them from actually having a licence but may impede them from using it.

6.4 Welsh language music

Venues in Wales that had put on live music in the previous 12 months were asked whether any events had used the Welsh language. Thirty per cent of Welsh venues said they had put on at least one event that included the Welsh language. Of those that had put on Welsh language events the median number of live music events to include the Welsh language was two, although two fifths of these venues put just one event on in Welsh.

6.5 Incidental music

In the 2007 survey all venues were asked two questions about 'incidental music': whether they were aware of the exemption for incidental music and, if so, whether they ever used this exemption. Nearly half of venues (47 per cent) said that they were aware of the exemption. Restaurants and cafes (41 per cent) and church halls and community centres (31 per cent) were less likely than other venue types to be aware of it. Of those respondents who were aware of the exemption, 36 per cent said they had used it (17 per cent of all venues).

6.6 Small venues 'exemption'

The Licensing Act allows certain live music conditions to be suspended in venues with a capacity of less than 200 people, in certain circumstances. This is sometimes referred to as a 'small venues exemption'. Venues that had put on live music in the previous 12 months and had total capacities of less than 200 were also asked two questions about the 'small venues exemption': whether they were aware of this exemption and, if so, whether their venue qualified for the associated concessions. Twelve per cent of these venues said that they were aware of the exemption. Of those who were aware of it, 35 per cent said that their venue qualified for these concessions (four per cent of all venues with capacities of 200 or less that had put on live music in the previous 12 months).

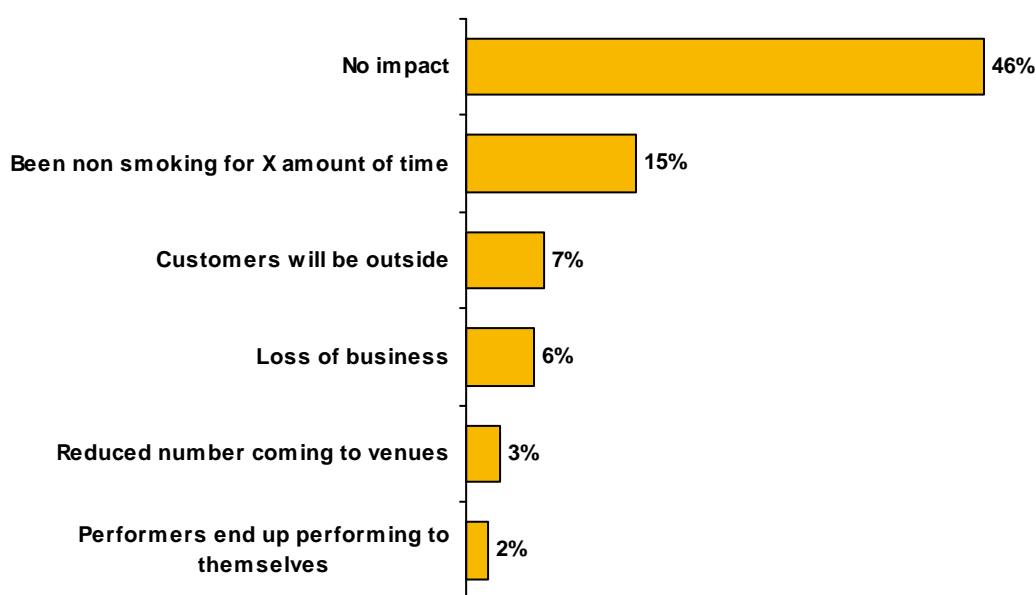
6.7 Impact of the smoking ban

The ban on smoking in enclosed public spaces was introduced in Wales on April 1st and in England on July 1st 2007. Respondents were asked what impact, if any, they felt the smoking ban would have on their provision of live music. The most common responses are shown in Figure 6.1.

Figure 6.1 – Perceived impact of the smoking ban on live music provision (open response)

Question: How, if at all, do you think the smoking ban introduced on July 1st in England and April 1st in Wales will affect any live music you might provide at your venue...?

Base: All respondents (2,251 venues)



The majority of venues (57 per cent) felt that the smoking ban would have no impact on the live music they provided, in some cases because they operated a no smoking policy prior to the introduction of the new legislation. Among the minority of respondents who did suggest possible impacts, these related mainly to concerns about loss of business and the impact on performances arising from smokers leaving events to smoke outside the venue.

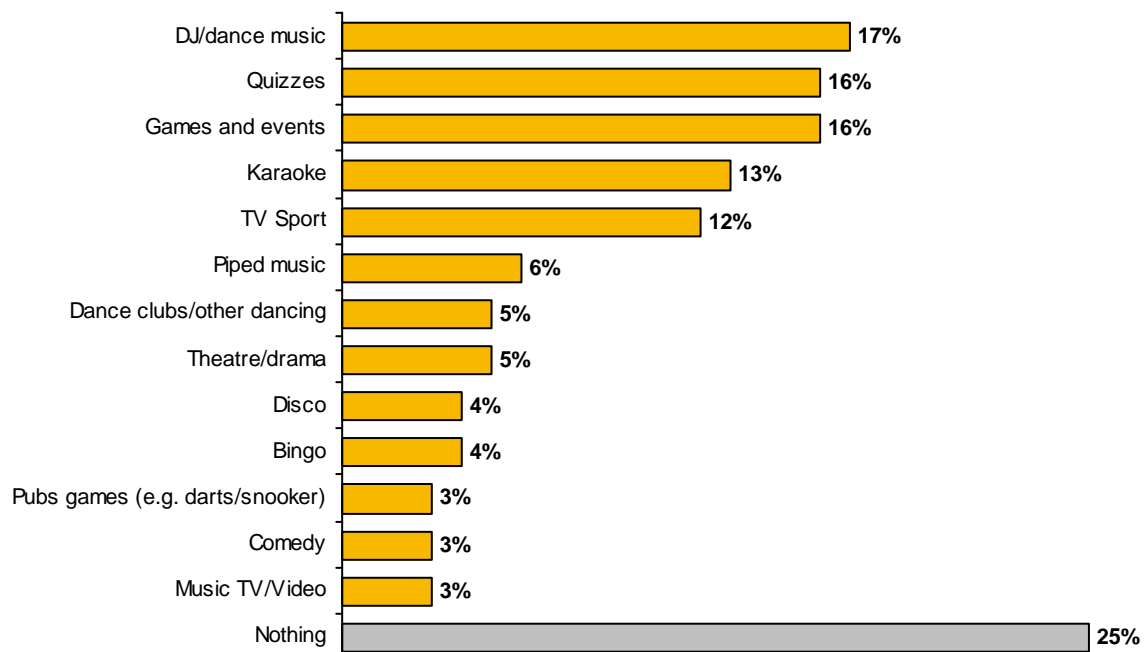
6.8 Other forms of entertainment offered

Venues that had put on live music in the previous 12 months were asked what other forms of entertainment their venue offered in addition to live music. The most common forms mentioned are shown in Figure 6.2.

Figure 6.2 – Other forms of entertainment offered by live music venues (unprompted)

Question: What other forms of entertainment, if any, do you offer as well as hosting live music in your venue?

Base: All who have put on live music in the last 12 months (989 venues)



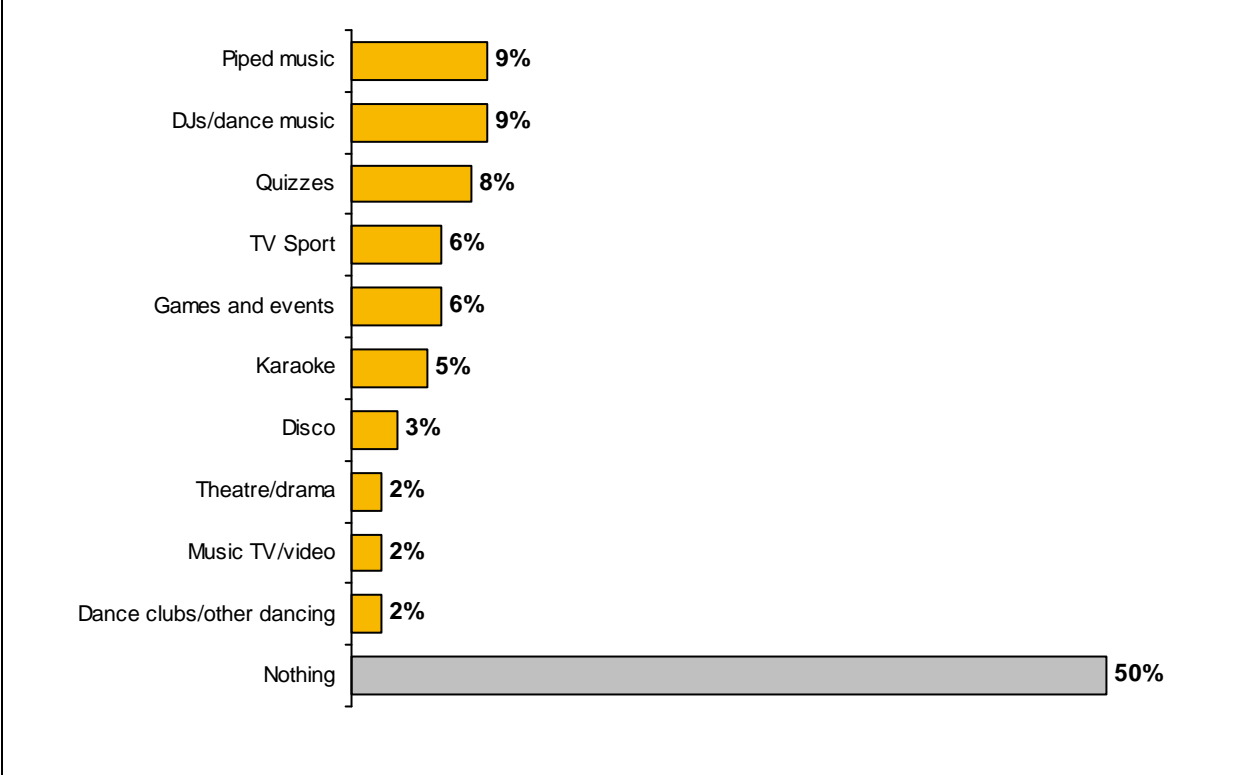
As Figure 6.2 shows, one in four venues (25 per cent) said that they did not offer any entertainment other than live music. The most common forms of entertainment offered were DJs or dance music (17 per cent); quizzes (16 per cent); games and events (16 per cent); karaoke (13 per cent); and sport on television (12 per cent). There was some variation by venue type in terms of what was offered: for example, church halls and community centres were far more likely than other venue types to stage theatre or drama, small clubs were most likely to have DJs or dance music and pubs were most likely to have karaoke.

Venues that had not staged any live music in the previous 12 months were asked what forms of entertainment they had offered instead of live music. The most common responses to this question are shown in Figure 6.3.

Figure 6.3 – Forms of entertainment offered instead of live music (unprompted)

Question: What forms of entertainment, if any, have/do you put on instead of hosting live music in your venue?

Base: All venues that have not had live music in last 12 months (1,050 venues)



These venues were less likely to offer other forms of entertainment than those that had put on live music in the previous 12 months: 50 per cent said that they had put on no other forms of entertainment. The most common forms of entertainment offered were piped music (nine per cent); DJs and dance music (nine per cent); and quizzes (eight per cent).

Venues that had not staged music in the previous 12 months were also asked whether they had any recorded music in their venue. Just one in five (20 per cent) said that they had no music at all, while more than half of venues (52 per cent) said that they had background or incidental music (including CDs, tapes, vinyl, MP3s, iPods, etc).

Appendix A

Technical Appendix

1 Introduction

This technical appendix provides a methodological account of a survey of secondary live music venues in England and Wales conducted by BMRB Social Research for the Department for Culture Media and Sport (DCMS).

The survey was carried out between 30th July and 2nd September 2007 and involved telephone interviews with a range of secondary live music venues across England and Wales³⁹. The aim of the survey was to measure the provision of live music in these venues and assess the early effects the Licensing Act 2003 on their staging of live music. The research builds on a baseline study carried out by Ipsos-MORI in 2004 prior to the introduction of the new Licensing Act.

The key aims of the 2007 survey were as follows:

- To establish the proportion of venues putting on live music;
- To establish the proportion of venues putting on live music 'regularly';
- To establish how these proportions have changed since 2004;
- To establish the proportion of venues who have started or stopped putting on live music since the introduction of the Act;
- To establish whether the Act made any difference to the ease of staging live music.

The survey set out to achieve 2,250 telephone interviews with establishments in England and Wales that may offer live music, but for whom live music is not the main purpose of the venue ('secondary live music venues'). The sample was bigger than that used in 2004 and allowed a greater level of analysis by establishment type and region.

³⁹ Pubs and bars, small clubs, hotels and inns, restaurants and cafes, student unions, church halls and community centres and members' clubs and organisations.

2 Sample design

2.1 Survey population

As in the 2004 survey, the target population for the survey comprised seven types of establishments, as follows:

- Pubs and bars
- Small clubs
- Hotels and inns
- Restaurants and cafes
- Members' clubs and associations
- Student Unions
- Church halls and community centres

In order to inform the survey design, population estimates for each of the seven categories of venue were obtained from a range of sources. Figure 2.1 shows the estimated population for each venue type and the sources of these figures.

Figure 2.1 – 2007 population figures

Venue type	Population figure	Source / breakdown of figures
Pubs and bars	52,660	51,479 pubs from the Beer and Pub Association, 1181 Wine Bars from the Valuation Office Agency (VOA code 303)
Small clubs	6,247	2,496 nightclubs and discos from the Bar Entertainment and Dance Association, 4,751 licensed clubs from the 2004 DCMS Licensing Bulletin
Hotels and inns	13,189	British Hospitality Association (excluding guesthouses and B&B establishments)
Restaurants and cafes	29,309	25,699 restaurants from the Valuation Office Agency (VOA code 234), 3,610 cafes from Foodservice Intelligence (provided by the British Hospitality Association)
Members' clubs and associations	19,913	2004 DCMS Licensing Bulletin
Student Unions	170	NUS Services
Church halls and community centres	27,393	8,158 rural halls from the Association for Communities in Rural England (ACRE), 500 rural halls in Wales from the Welsh Council for Voluntary Action, 4,500 urban community centres from Community Matters, 14,781 places of worship from Experian
Total	149,427	

Some of the population estimates obtained differed considerably from those recorded for the 2004 survey. A comparison of the two sets of estimates is shown in Figure 2.2, with explanations provided for any large differences. Smaller differences are likely to result from actual changes in the populations of particular types of venue over the past three years.

Figure 2.2 – Comparison of 2004 and 2007 population figures

Venue type	2004 population	2007 population	Reason for difference
Pubs and bars	58,000	52,660	The 2004 figure included pubs in Scotland and Northern Ireland. The figure was later corrected to 53,000.
Small clubs	5,800	6,247	N/A
Hotels and inns	22,000	13,189	The 2004 figure also came from the British Hospitality Association, but included guesthouses and bed and breakfast accommodation. It was decided in 2007 to exclude these establishments from the survey.
Restaurants and cafes	24,929	29,309	The 2004 figure was sourced from the Yell Business Database ⁴⁰ . It is unclear whether the difference between the two figures results from a difference in the way the category was defined or reflects a real change in the number of restaurants and cafes in England and Wales.
Members' clubs and associations	22,000	19,913	N/A
Student Unions	447	170	The 2004 population figure was provided by the National Union of Students (NUS) and included a large number of colleges of further education. It was agreed to redefine the population as student unions with commercial activities attached to higher education institutions in England and Wales.
Church halls and community centres	18,000	27,393	The 2004 population was recorded as being provided by Action for Communities in Rural England (ACRE). ACRE only holds information for rural village halls in England and excludes urban community centres and halls attached to places of worship, as well as village halls in Wales. The 2007 population includes each of these additional categories of venue.
Total	151,176	149,427	

2.2 Sampling frames

Whilst the sources shown in Figure 2.1 were judged to provide the best population estimates for all of the respective venue types, these sources could not be used as a sampling frame for the survey, because they generally do not include contact details for establishments. It was therefore necessary to identify alternative sources to establish a sampling frame for the survey.

As in 2004, the main sampling frame used for the survey was the Experian business database (formerly the Yell business database). This database was used to source samples

⁴⁰ The Yell database in 2004 was the electronic Yellow Pages. This database is now managed by Experian.

of pubs and bars; small clubs; hotels and inns; restaurants and cafes; members' clubs and associations; and church halls⁴¹. The Experian database was chosen after an assessment of its coverage of these establishments relative to that of two similar business databases, those held by Dun and Bradstreet and Blue Sheep, which found that Experian had the most comprehensive coverage of the three sources. This ensured the highest level of representativeness available for the survey population. Figure 2.3 shows the number of records held by Experian for each establishment type, up against the population figures.

Figure 2.3 – Number of records held by Experian up against 2007 population

Venue type	Experian	Population
Pubs and bars	33,200	52,660
Small clubs	1,381	6,247
Hotels and inns	10,418	13,189
Restaurants and cafes ⁴²	38,194	29,309
Members' clubs and associations	9,593	19,913
Student Unions	Sourced separately	170
Church halls and community centres	14,781 ⁴³	27,393

The establishment types sampled through the Experian database were specified in terms of their Standard Industrial Classification (SIC) code. The SIC codes used, alongside their descriptions, are shown in Figure 2.4. These matched the codes used in the 2004 survey, with the exception of church halls, which in 2004 were sourced via Church of England records.

Figure 2.4 – SIC codes used to define venue types

Venue type	1992 SIC codes and descriptions
Pubs and bars	55402 (Public houses and bars)
Small clubs	55401 (Licensed clubs)
Hotels and inns	55111 (Hotel trade)
Restaurants and cafes	55301 (Licensed restaurants), 55302 (Unlicensed restaurants and cafes) ⁴⁴
Members' clubs and associations	9133 (Activities of other membership organisations not elsewhere classified), 9262 (Sporting facilities) ⁴⁵
Church halls	9131 (Religious organisations)

⁴¹ A sample of religious organisations was obtained from the Experian database. Church halls were identified via a screening question at the start of the interview to establish whether these organisations had halls attached to them. Those that did not were excluded from the survey.

⁴² Experian total for restaurants and cafes higher than population as the Experian definition includes establishments that were outside the scope of the survey – e.g. those without tableside service, fast food establishments, etc. As the sample would include some ineligible establishments a screening question was included at the start of the questionnaire – see chapter 3 for further details.

⁴³ Only includes church halls as defined by the SIC code for religious organisations. Community centres and village halls sourced separately.

⁴⁴ As in the 2004 survey 55301 was defined as 'restaurants' and 55302 as 'cafes'.

⁴⁵ A third of the Members' clubs and associations sample was taken from SIC 9262 with two thirds from SIC 9133.

Screening questions were included at the start of the questionnaire to determine eligibility of establishments in terms of being able to provide live music if they chose to. In order to identify church halls, the sample of religious organisations was screened to establish whether these were places of worship and, if so, whether they had halls attached to them. Chapter 3 provides further detail on the screening procedure.

The Experian database was deemed unsuitable as a sampling frame for student unions and community centres. Sampling frames for these categories were identified as detailed below.

Student unions

While the Experian database could provide a sample of institutions offering higher education courses, this sample would include a large number of further education institutions and would not identify contact details for student unions where these were present. The sample of student unions was therefore sourced from NUS Services, a branch of the National Union of Students (NUS) concerned with the commercial activities of student unions attached to higher education institutions. NUS Services holds records for approximately 140 of the estimated population of 170 student unions, so were able to ensure adequate coverage of this population.

Community centres

In the 2004 survey the sample of community centres was sourced from Community Matters and ACRE. It is unclear how the sample was selected and it was therefore not possible to directly replicate the 2004 approach. The approach taken in 2007 is detailed below.

Rural village halls

Details of rural village halls in England are held by 38 rural community councils (RCCs). Contact details for these RCCs were passed on to BMRB by ACRE, via the DCMS. Eight RCCs were then selected, ensuring geographic representation across English regions. Details of village halls in these RCCs were then drawn from the various RCC websites. Where a selected RCC did not include contact details for halls a reserve in the same geographic region was selected from the remaining RCCs to complete the sample. A sample of c. 400 village halls in Wales (from a population of around 500) was provided by the Welsh Council for Voluntary Action (WCVA).

Urban community centres

A sample of urban community centres was provided by Community Matters, the national federation for community organisations. Community Matters provided approximately 1,000 records of urban community centres in England and Wales from a population in the region of 4,500. The sample provided was geographically spread across England and Wales, ensuring all regions were represented.

2.3 Selection of sample

Stratified random samples of each venue type were selected from the relevant sampling frame. For the most part, target issued sample sizes were set in proportion to the size of the relevant population. However, a degree of disproportionate sampling was introduced to ensure adequate coverage of specific groups within the overall sample, notably venues in Wales and student unions. At the fieldwork stage target quotas were set for the number of interviews to be achieved with each type of venue within country (England and Wales). Separate quotas were also set for sub-categories of venue, specifically:

- Separate quotas were set for halls attached to places of worship, rural village halls and urban community centres.
- Separate quotas were set for restaurants and cafes.
- Within members' clubs and organisations, separate quotas were set members' clubs and sports clubs.

Stratified random samples of each venue type were selected from the relevant database, in line with quota targets.

The survey required separate analysis of Welsh venues to be carried out. If Welsh venues had been selected proportionate to the total population, around 150 interviews in Wales would have resulted (8% of the total sample). To ensure sufficient numbers for separate analysis, and additional 250 interviews were conducted with venues in Wales, giving a total of 405 interviews (18% of the total sample).

2.4 Interviews achieved

A total of 2,251 interviews was achieved. Figure 2.5 shows the breakdown of interviews by venue type compared with universe estimates for each venue type in England and Wales. As the table shows, the proportions of interviews achieved by venue type were largely in line with the population profile. As discussed earlier, student unions were purposively over-sampled to enable separate analysis of these venues.

Figure 2.5 – Number of interviews achieved by venue type and population figures

Venue type	Interviews achieved	% of total	Population	% of population
Pubs and bars	760	33.8	52,660	35.2
Small clubs	102	4.5	6,247	4.2
Hotels and inns	203	9.0	13,189	8.8
Restaurants and cafes ⁴⁶	377	16.7	29,309	19.6
Student Unions	49	2.2	170	0.1
Members' clubs and organisations ⁴⁷	371	16.5	19,913	13.3
Church halls and community centres ⁴⁸	389	17.3	27,939	18.7
Total	2251	100	149,427	100

⁴⁶ This included 329 restaurants and 48 cafes.

⁴⁷ This included 271 members' clubs and 100 sports clubs.

⁴⁸ This included 136 rural village halls, 95 urban community centres and 158 halls attached to places of worship.

3 Questionnaire and piloting

3.1 Questionnaire drafting

The questionnaire was drafted by BMRB following a meeting with DCMS and an expert group to discuss the issues to be covered. Around half of the questions were carried over from the 2004 survey, to ensure that changes in key areas could be monitored and the impact of the Licensing Act on the overall level of provision could be assessed. The main focus of the new questions was on assessing the impact of the Licensing Act on various aspects of staging live music. The questionnaire was then tested and modified during two stages of piloting.

3.2 First pilot stage

The first stage of the pilot acted as both a general test of the questionnaire and a specific test of key survey questions. Structured cognitive follow-up questions were added to the questionnaire to assess how respondents were understanding key words and phrases and their wider thought processes in answering questions. The cognitive follow-up questions included the following:

- *[After being asked whether they had put on live music in the last 12 months] What different types of live music did you take into account when answering the last question? What sort of things were you not sure whether or not to include? How would you define 'live music'?*
- *[After being asked how many live music events had been put on in the last 12 months] How did you arrive at this figure? How did you work it out? What sorts of things were you unsure whether or not to include?*
- *[After each of the 'specific impact' questions, only if they said there had been a change] Can I just check, has this changed specifically as a result of the Licensing Act, or do you think this change would have happened anyway?*

Responses from these questions were then used to inform the design of the final questionnaire.

The first stage of piloting was carried out on 27th – 28th June 2007, with 16 interviews achieved across a full range of venue types. All of the interviews were monitored by BMRB researchers. This monitoring, along with responses at the cognitive follow up questions and feedback from interviewers was used put together a short report that was sent to DCMS with recommendations for changes ahead of the second stage of piloting.

3.3 Second pilot stage

The suggested changes were reviewed by DCMS and the questionnaire was agreed for a second and final stage of piloting. The cognitive follow up questions were not included at this stage, although the questions that asked whether changes were due to the Licensing Act or would have happened anyway remained in the questionnaire⁴⁹. The second pilot was carried out on 4th – 5th July 2007 following a briefing of interviewers on changes that had been made to the questionnaire. Fourteen interviews were achieved, again across a range of different venue types. As in the first pilot all interviews were monitored by BMRB researchers.

⁴⁹ The first stage of piloting revealed that some venues did say that the Act had resulted in changes to aspects of live music provided but then at the follow up questions had said that these changes would have happened anyway. It was therefore decided to keep these follow up questions in the questionnaire to ensure that changes that were not specifically as a result of the Act could be excluded at the analysis stage.

A short report was written with a small number of recommendations for further changes to the questionnaire. These were discussed with DCMS following the second pilot. The final questionnaire for this main stage was then agreed and this is included as Appendix B. Section 3.4 includes details on some specific aspects of the final questionnaire.

3.4 Screening questions

As stated in chapter 2, there was a chance that some venues included in the sample may not have been eligible for the survey. Figure 3.1 shows the screening questions were included for specific venue types together with the reasons for asking these.

Figure 3.1 – Survey screening questions

Venue type	Screening question	Reason for asking
Places of worship	<i>Is there a hall attached to, or associated with, your place of worship?</i>	The questionnaire asked about activities in a church hall or hall attached to the place of worship and places of worship without halls would not be within the scope of the survey
Restaurants and cafés	<i>Does your restaurant offer tableside or waiter service?</i>	Restaurants and cafés without tableside or waiter service are not covered by the Licensing Act and would be outside the scope of the survey
Members' clubs and associations	<i>Can I just check, do you have any kind of bar, hall or social club as part of your club or association?</i>	This code included sports clubs some of which may not have had a bar or social space but simply a pitch or field – and therefore would not be able to provide live music
Hotels	<i>Can I just check, does your hotel include a bar, or any other kind of communal or social space?</i>	While guesthouses and bed and breakfast establishments were excluded from the population figure there was a possibility that some would have been included in the Experian sample. As a result a screening question was asked to exclude venues without a communal space

Respondents that answered 'no' to any of these questions were deemed ineligible and therefore excluded from the survey. The following numbers of venues were found to be ineligible:

- Places of worship: 96 venues
- Restaurants and cafés: 181 venues
- Members' clubs and associations: 116 venues
- Hotels: 50 venues

In addition, a number of other venues were found to be ineligible *before* any of these questions were asked. Further details on these figures are included in chapter 4.

4 Fieldwork

Main stage fieldwork for the survey was conducted between 30th July and 2nd September 2007. All interviews were carried out using computer-assisted telephone interviewing (CATI) by fully-trained telephone interviewers from the Hull telephone centre of Kantar Operations⁵⁰. Interviews were conducted with the individual identified by each sampled establishment as being responsible for taking decisions about hosting live music or as having the most knowledge about any live music hosted by the venue. All fieldwork was conducted according to the Market Research Society Code of Conduct and to ISO20252 standards of supervision and quality control.

All interviewers were video-briefed by BMRB researchers before commencing interviewing on the survey. The briefing included the following:

- Background to the Licensing Act;
- Background to the survey;
- Survey aims and objectives;
- A discussion of the survey methodology;
- Who the most appropriate respondent at different venues would be;
- A question-by-question run-through of the questionnaire;
- A question and answer session;
- Who to contact if interviewers had any further queries or encountered any problems when interviewing.

Figure 4.1 shows a breakdown of fieldwork outcomes by venue type.

Figure 4.1 – Sample breakdown by type of establishment

	Pubs and bars	Small clubs	Hotels and inns	Restaurants and cafes	Members' clubs	Student unions	Church halls and community centres	Total
Total sample provided	3,284	725	1,018	2,703	2,489	142	2,882	13,243
Over quota	1,359	280	359	1,052	989	60	1,381	5,480
Effective total sample	1,925	445	659	1,651	1,500	82	2,376	7,763
Screened out/ ineligible	86	25	120	347	301	11	415	1,305
Refused	545	76	200	439	272	14	183	1,729
Bad/ other ineffective/ other	534	242	136	488	556	8	514	2,478
Achieved	760	102	203	377	371	49	389	2,251

⁵⁰ Operational aspects of BMRB projects are handled by Kantar Operations, which was formed in 2004 following the merger of the operations capabilities of BMRB, Research International, Millward Brown and BPRI.

Note to accompany Figure 4.1	
Total sample provided	The total number of contacts supplied to the Kantar Operations telephone centre.
Over quota	The total number of contacts without final outcomes when the survey was completed.
Effective total sample	The total number of contacts used (the total sample row minus the over quota row).
Screened out/ineligible	The number of respondents who were deemed ineligible to take part.
Refused	The number of potential respondents who refused to take part.
Bad/other ineffective/other	These include companies having gone out of business or having moved, licensees not being available during the fieldwork period, and establishments where we reached the maximum number of call backs with no reply.
Achieved	The total number of interviews achieved.

5 Weighting and data processing

5.1 Weighting

While quotas were set to ensure that the breakdown of interview numbers by venue type closely reflected the population profile, some establishments were over or under-represented when doing this. To correct this rim weights were applied to venue type and region to ensure that the final data was representative of the overall profile of secondary live music venues in England and Wales.

5.1 Notes on the data

Results within the report are generally presented as percentages. Where percentages do not add up to 100%, this is due to rounding of figures or where respondents were able to provide more than one answer to a question. Where base sizes are particularly small absolute numbers of respondents are used, using unweighted data⁵¹.

Questions on number of live music events were asked as unbanded numeric variables. This means that the interviewer takes a number from the respondent and types this raw number into the CATI programme. On the 2004 survey these questions were asked as banded numeric variables. Questions were asked in exactly the same way as in 2007 but rather than typing in the raw number the interviewer would instead be presented with a series of banded answers (for example: 1, 2, 3, 4-5, 6-7, 8-10, etc) and code the response to the appropriate band. Ipsos-MORI, who conducted the 2004 survey, then used mid-points in each band to calculate the mean number of live music events. Although the 2007 survey collected raw data, to ensure comparability responses were subsequently coded to the same bands as were used in the 2004 survey. The bands and mid-points used are shown in Figure 5.1.

Figure 5.1 - Bands and midpoints used to calculate mean numbers of gigs

Band	Mid-point
1	1
2	2
3	3
4-5	4.5
6-7	6.5
8-10	9
11-20	15.5
21-31	26
32-40	36
41+	60

As the table shows, a mid-point of 60 was assumed if a venue had put on more than 40 live music events in the period asked about. By coding numeric responses in this way a like-for-like comparison can be made with the equivalent data in 2004. However, as the raw data is also available from the 2007 survey this means that any future surveys can use also use this as a comparison.

To analyse the data by size of venue an aggregate variable was created from the questions that asked about how many areas venues had and the approximate size of each area. As in 2004 the capacity of each area was asked in bands. For each size band a mid-point was calculated, as shown in Figure 5.2.

⁵¹ For example, the results relating to the impact of the Act on venues that previously operated under '2 in a bar' are reported in this way, due to small base sizes.

Figure 5.2 – Mid-points used to calculate aggregates

Size band of area	Mid-point
50 or less	25.5
51-100	75.5
101-200	150.5
201-500	350.5
501+	501

For venues that had more than one area the mid-points of each were added to create an overall venue size variable.

5.3 Statistical reliability

Because a sample of secondary live music venues, rather than the entire population, was interviewed the percentage results are subject to sampling tolerances. These sampling tolerances vary with the size of the sample and the percentage figure concerned. For example, for a question where a 50% of people in a weighted sample of 2,251 respond with a particular answer, there is a 95% chance that this result would not vary more than two percentage points, plus or minus, from the result that would have been obtained from a census of the entire population. Figure 5.3 shows the tolerances that may apply in the main report⁵².

Figure 5.3 – Approximate sampling tolerances applicable to percentages at or near these levels (at the 95% confidence interval)

Size of sample or sub-group on which survey result is based	10% or 90% + or -	30% or 70% + or -	50% + or -
All venues (2,251)	1	2	2
All venues that have had live music in last 12 months (989)	2	3	3
All pubs that have had a live music event in last 12 months (347)	3	5	5

Tolerances are also involved in the comparison of results between different elements of the sample. A difference must be of at least a certain size to be statistically significant. Figure 5.4 provide a guide to the sampling tolerances applicable to comparisons between sub-groups.

⁵² Calculations used for these estimations are based on a truly random sampling methodology. For the approach used for this survey, we should treat these figures as indicative, rather than absolutely accurate.

Figure 5.4 – Differences required for significance at the 95% confidence level at or near these percentages

Size of sample or sub-group on which survey result is based	10% or 90% + or -	30% or 70% + or -	50% + or -
Pubs vs Restaurants and cafes (760 vs 377)	4	6	6
Members' clubs and associations vs church halls and community centres (371 vs 389)	4	7	7
Venues in South East vs Venues in South West (staging live music) (145 vs 119)	7	11	12

Appendix B

Questionnaire

BMRB\45106420

**DCMS 2007 Survey – Impact of the 2003 Licensing Act on Live Music
in England and Wales**

Final Questionnaire

27th July 2007

SURVEY INTRODUCTION AND SCREENING QUESTIONS

Introduction

Good morning/afternoon/evening. My name is and I am calling on behalf of the British Market Research Bureau. We are carrying out an important study amongst [NAME OF CATEGORY OF ESTABLISHMENT] to find out about your experiences since the introduction of the Licensing Act in 2005. We are particularly interested about whether or not you have put on live music in your venue and how this may have been affected by the Licensing Act.

Would you be the right person to speak to about this?

INTERVIEWER: IF RESPONDENT SAYS THEY DON'T PUT ON LIVE MUSIC
ADD:

We are very interested in speaking to establishments that don't put on live music, to find out the reasons for this. The interview will be shorter if you don't put on live music – it should only take between five and ten minutes.

INTERVIEWER: IF THE PERSON IS NOT THE BEST PERSON TO SPEAK TO
ADD:

Is it possible to speak to that person now? IF YES, CONTINUE. IF NO, TAKE CONTACT DETAILS AND MAKE APPOINTMENT.

[IF PLACE OF WORSHIP] IF RESPONDENT SAYS THEY DO NOT HAVE A CHURCH HALL ATTACHED TO THEIR PLACE OF WORSHIP CODE AS INELIGIBLE AND ADD COMMENTS.

ONCE SPEAKING TO BEST PERSON RE-READ INTRODUCTION AND REASSURE ABOUT CONFIDENTIALITY:

I would like to assure you that all of your responses will remain COMPLETELY ANONYMOUS and that results will be provided to the client in aggregate form only.

ONCE AGREED TO TAKE PART, YOU CAN INFORM THAT THE SURVEY IS ON BEHALF OF THE DEPARTMENT FOR CULTURE, MEDIA AND SPORT.

IF PLACE OF WORSHIP

q0elig Is there a hall attached to, or associated with, your place of worship?

1. Yes – ELIGIBLE FOR SURVEY
2. No - CLOSE
3. Don't know - CLOSE

IF RESTAURANT (from sample)

q0table Does your restaurant offer tableside or waiter service?

1. Yes
2. No (THANK AND CLOSE)

IF MEMBERS CLUBS AND ASSOCIATIONS (from sample)

qg Can I just check, do you have any kind of bar, hall or social club as part of your club or association?

1. Yes
2. No (THANK AND CLOSE)

IF HOTEL (from sample)

qh Can I just check, does your hotel include a bar, or any other kind of communal or social space?

1. Yes
2. No (THANK AND CLOSE)

ASK ALL

q0decid We are specifically interested in decisions about putting on live music in your establishment – whether or not you do at present, or plan to do so in the future. Are you the person within your establishment who is responsible for taking decisions about hosting live music, or knows most about any live music your venue may host?

INTERVIEWER: RESPONDENT CAN BE SOLE OR JOINT DECISION MAKER

1. Yes
2. No
3. Don't know

IF NO OR DON'T KNOW AT Qb

q0trans Is it possible to speak to that person now?

1. Yes
2. No

IF YES CONTINUE. IF NO TAKE CONTACT DETAILS FOR PERSON WHO KNOWS MOST ABOUT LIVE MUSIC AND MAKE APPOINTMENT TO CALL BACK

ASK ALL

q0group Are you part of a [group or association/chain] of establishments?
IF YES: Does your group have a policy on staging live music?

INTERVIEWER NOTE: A GROUP IS THE SAME AS A CHAIN OF ESTABLISHMENTS

1. Yes – part of a group/chain with a policy
2. Yes – part of a group/chain but no policy
3. Yes – part of a group/chain but don't know if have a policy
4. No – not part of a group
5. Don't know

IF Qd = 1

q0grPol What is the policy that relates to putting on live music in your venue?

READ OUT

1. We have to have live music events/performances
2. We are **encouraged to** have live music events/performances
3. We are **encouraged not to** have live music events/performances
4. We are **instructed not to** have live music events/performances
5. Other (please specify)
6. Don't know

ASK ALL

q0music Has there been any live music played or performed in your venue over the course of the past 12 months? By live music we mean music performed in public by at least one person in real time, that is, not pre-recorded.

1. Yes – SKIP TO SECTION Y
2. No – GO TO SECTION N
3. Don't know/can't remember – SKIP TO SECTION P

SECTION N: QUESTIONS FOR THOSE WHO HAVE NOT STAGED LIVE MUSIC IN THE LAST 12 MONTHS

qNrecor **IF Q1 = 2**
Have you put on any kind of recorded music over the course of the past year?
IF YES: What types of recorded music do you put on? PROBE FULLY: What else?

DO NOT READ OUT.
CODE ALL THAT APPLY.

1. No music at all
2. Yes – jukebox
3. Yes – MTV/other music channel
4. Yes – background/incidental music (CD, tape, vinyl, MP3/iPod etc)
5. Yes – DJ
6. Yes – radio
7. Yes – karaoke
8. Yes – other (please specify)
9. Don't know

qNpast **IF Q1 = 2**
Has there been any live music played or performed in your venue before, that is more than a year ago?

1. Yes
2. No
3. Don't know

qNstart **IF QN2 = 1**
Can I just check, did your venue START putting on live before or after the new Licensing Act came into force on 24th November 2005?

1. Before Act came into force
2. After Act came into force
3. Don't know

qNpastM/Y **IF QN2 = 1**
And when did you STOP putting on live music in your venue?

CODE MONTH AND YEAR
Additional codes:
When the Licensing Act was introduced
Have not stopped
Don't know

qNov **IF NOVEMBER 2005**
Can I just check, was this before or after 24th November 2005?

ADD IF NECESSARY: This was the date when the new Licensing Act was introduced.

1. Before 24th November 2005
2. After 24th November 2005
3. On 24th November 2005
4. Don't know/can't remember

- qNystop** **IF QN2 = 1 AND NOT 'Have not stopped' AT QN2d**
For what reasons did the playing or performing of live music stop?
- DO NOT PROMPT
PROBE FULLY: For what other reasons?
USE THE FOLLOWING SPECIFIC PROBES:
- IF 'CONDITIONS OF LICENCE': What conditions?
IF 'HEALTH AND SAFETY': Are these requirements of your licence or other health and safety requirements?
IF 'VENUE NOT APPROPRIATE': In what way?
IF 'WOULDN'T USE IT': Why?
IF 'LEGISLATION': What legislation?
IF 'COST': Cost of what exactly?
IF COST OF LICENCE OR AUTHORISATION OR BUREAUCRACY OF GETTING LICENCE/AUTHORISATION: Can I just check what licence/authorisation you're talking about? (Premises licence/PRS licence/PPL licence/Other type of licence (specify what this is)).
- (OPEN RESPONSE)
- qN3ns** **IF QN2D = Have not stopped**
Is there any reason why you've not put on live music in the last 12 months in particular?
- DO NOT PROMPT
PROBE FULLY: For what other reasons?
- (OPEN RESPONSE)
- qNfreq** **IF QN2 = 1**
How frequently was live music played or performed in your venue in the past?
- PROMPT TO PRECODES
1. Several times a week
 2. Once a week
 3. Once a fortnight
 4. Once a month
 5. Once every few months
 6. Less often than this
 7. Varied too much to say
 8. Don't know/can't remember
- qNinst** **IF Q1 = 2**
What forms of entertainment, if any, have/do you put on instead of hosting live music in your venue?
- DO NOT PROMPT. PROBE: 'Anything else'?
1. Music TV/Video
 2. Piped music
 3. DJ/dance music
 4. TV – sport
 5. Games and events
 6. Comedy
 7. Quizzes

8. Karaoke
9. Theatre/Drama
10. Films
11. Other (please specify)
12. Nothing
13. Don't know

qNynot

IF QN2 = 2

Why do you **not** have live music in your venue?

PROBE FULLY: For what other reasons?

PROBE FOR SPECIFIC REASONS: Why do you say that?

USE THE FOLLOWING SPECIFIC PROBES:

IF 'CONDITIONS OF LICENCE': What conditions?

IF 'HEALTH AND SAFETY': Are these requirements of your licence or other health and safety requirements?

IF 'VENUE NOT APPROPRIATE': In what way?

IF 'WOULDN'T USE IT': Why?

IF 'LEGISLATION': What legislation?

IF 'COST': Cost of what exactly?

IF COST OF LICENCE OR AUTHORISATION OR BUREAUCRACY OF GETTING LICENCE/AUTHORISATION: Can I just check what licence/authorisation you're talking about? (Premises licence/PRS licence/PPL licence/Other type of licence (specify what this is)).

(OPEN RESPONSE)

qNfutur

IF Q1 = 2

Would you consider having live music in this venue in the future?

Would you say...? READ OUT

1. Yes – definitely
2. Yes – probably
3. Yes - possibly
4. No – probably not
5. No – definitely not
6. Don't know

qNynotF

IF QN4 = 4 or 5

Why not?

WRITE IN. PROBE FULLY: For what other reasons?

qN5b

IF QN2 = 1

Can I just check, how many separate areas for putting on or performing live music are there in your venue?

IF NO AREAS CODE NULL

1. 1
2. 2
3. 3
4. 4
5. 5
6. 6-7
7. 8-10
8. 11+

9. Don't know

qYsz

REPEAT QUESTION UP TO 5 TIMES FOR DIFFERENT AREAS

What is the maximum capacity of your [largest/second largest/third largest, etc] area where live music could be put on or performed?

1. 50 or less
2. 51 – 100
3. 101 – 200
4. 201 – 500
5. 501+
6. Don't know

qNlicen

IF Q1 = 2

May I check, does your current premises licence (MEMBERS' CLUBS: or club premises certificate) allow you to stage live music in this venue?

1. Yes
2. No
3. Don't know

qNvary

IF QN6 = 2 & QN4 = 1 or 2

If you decided to stage live music in this venue in the future, what authorisation do you think you would use? For example, do you think you would vary your premises licence (MEMBERS' CLUBS: or club premises certificate) to allow you to stage live music or would you use temporary event notices?

PROBE AND CODE ALL THAT APPLY

IF NECESSARY: A Temporary Event Notice is a notification that can be given to a licensing authority in order to authorise relatively small scale (up to 499 people), occasional, short-term (up to 96 hours) events involving licensable activities. They are subject to certain restrictions.

1. Would vary licence
2. Would use TENS
3. Would only have music that is 'incidental'
4. Other (CODE & TYPE IN)
5. Don't know

SECTION Y: QUESTIONS FOR THOSE WHO DO STAGE LIVE MUSIC

qYlong **IF Q1 = 1**
As far as you know, how long has your venue been putting on or had live music performed there?

IF UNSURE ASK FOR BEST GUESS

1. Less than a year
2. 1 to 2 years
3. More than 2 to 3 years
4. More than 3 to 5 years
5. More than 5 to 10 years
6. Longer than 10 years
7. Don't know

qYstartM/Y **IF QY1 = 1 or 2**
When did your venue start putting on live music?

IF UNSURE ASK FOR BEST GUESS

CODE MONTH AND YEAR

Additional codes:

When the Licensing Act was introduced

Don't know

qYnov **IF NOVEMBER 2005**
Can I just check, was this before or after 24th November 2005?

ADD IF NECESSARY: This was the date when the new Licensing Act was introduced.

1. Before 24th November 2005
2. After 24th November 2005
3. On 24th November 2005
4. Don't know/can't remember

qYstaR **IF QY1 = 1 OR 2**
Why did your venue start putting on live music at this time?

PROBE FULLY: For what other reasons?

PROBE FOR SPECIFIC REASONS: Why do you say that?

(OPEN RESPONSE)

qY1d **IF Q1 = 1**
Can I just check, are you still putting on live music in your venue?

1. Yes
2. No
3. Don't know

qY1e **IF QY1d = 2**
Why have you stopped putting on live music in your venue?

PROBE FULLY

(OPEN RESPONSE)

qYmore **IF 1 YEAR OR MORE AT QY1 AND QY1D DOES NOT EQUAL 2**
In general, does your venue have more, less or the same number of live music events/sessions than this time last year?

IF MORE: Is it much more/a little more

IF LESS: Is it much less/a little less?

1. Much more
2. A little more
3. Same amount
4. A little less
5. Much less
6. Don't know

qYtypes **IF Q1 = 1**
What **types** of live music have there been at your venue in the last year?

PROBE FULLY: What other types of music?
CODE ALL THAT APPLY.

1. Pop/popular
2. Rock
3. Disco
4. Jazz
5. Country
6. Brass band
7. Hip hop/RnB
8. Folk
9. Classical
10. Choral
11. Indie
12. Other (please specify)
13. Don't know

qYamp Do you have amplified music, non-amplified music, or both in your venue?

IF RESPONDENT HAS STOPPED PUTTING ON LIVE MUSIC THIS RELATES TO WHAT THEY WERE DOING BEFORE THEY STOPPED

SINGLE CODE ONLY

1. Amplified
2. Non-amplified
3. Both

qYampM **IF Qy4 = 3**
Is the live music you have on mostly amplified, mostly non-amplified, or an equal mixture of the two?

IF RESPONDENT HAS STOPPED PUTTING ON LIVE MUSIC THIS RELATES TO WHAT THEY WERE DOING BEFORE THEY STOPPED

SINGLE CODE ONLY

1. Mostly amplified
2. Mostly non amplified

3. Equal
4. Don't know

qYareas **IF Q1 = 1**
How many separate areas for putting on or performing live music are there in your venue?

1. 1
2. 2
3. 3
4. 4
5. 5
6. 6-7
7. 8-10
8. 11+
9. Don't know

qYsz **REPEAT QUESTION UP TO 5 TIMES FOR DIFFERENT AREAS**
What is the maximum capacity of your [largest/second largest/third largest, etc] area where live music is being put on or performed?

1. 50 or less
2. 51 – 100
3. 101 – 200
4. 201 – 500
5. 501+
6. Don't know

qYnum12 **IF Q1 = 1**
How many separate live music events, performances or sessions have there been, in total, in this venue during the past 12 months?

IF RESPONDENT IS UNSURE OF THE EXACT NUMBER, PLEASE ASK THEM TO ESTIMATE

NUMERIC
Don't know

qYanyW **IF REGION (FROM SAMPLE) = WALES AND Q1 = 1**
And have any of these live music events, performances or sessions included use of the Welsh language?

INTERVIEWER NOTE: CODE YES IF PERFORMANCES OR EVENTS ONLY **PARTLY** USED THE WELSH LANGUAGE

1. Yes
2. No
3. Don't know

qYnumW **IF QY9ai = 1**
How many of these live music events, performances or sessions have included use of the Welsh language?

IF RESPONDENT IS UNSURE OF THE EXACT NUMBER, PLEASE ASK THEM TO ESTIMATE. INCLUDE EVENTS THAT ONLY PARTLY USE THE WELSH LANGUAGE

NUMERIC
Don't know

[CATI CHECK THAT QY9Aii IS NOT GREATER THAN Q9a]

qYnum3 **IF Q1 = 1**
And how many of those live music events, performances or sessions have there been, in total, in this venue during the **last three months** (EMPHASISE THREE MONTHS)?
IF RESPONDENT IS UNSURE OF THE EXACT NUMBER, PLEASE ASK THEM TO ESTIMATE/GUESSTIMATE

NUMERIC
Don't know

qYpriv **IF QY9b > 0**
And in the last three months, how many of those live music events, performances or sessions were private functions such as weddings, birthdays, etc?

IF RESPONDENT IS UNSURE OF THE EXACT NUMBER, PLEASE ASK THEM TO ESTIMATE/GUESSTIMATE

NUMERIC
Don't know

qYfree **IF QY9b > 0**
And in the last three months, how many of the live music events, performances or sessions were open to the public and were **free of charge**?

IF RESPONDENT IS UNSURE OF THE EXACT NUMBER, PLEASE ASK THEM TO ESTIMATE/GUESSTIMATE

NUMERIC
Don't know

qYpub **IF QY9b > 0**
And in the last three months, for how many events, performances or sessions was there a charge made for entry?

IF RESPONDENT IS UNSURE OF THE EXACT NUMBER, PLEASE ASK THEM TO ESTIMATE/GUESSTIMATE

NUMERIC
Don't know

[HARD CATI CHECK THAT QY9b = QY9c + d + e]

qYother **IF Q1 = 1**
What other forms of entertainment, if any, do you offer as well as hosting live music in your venue?

DO NOT PROMPT. PROBE: 'Anything else'?

1. Music TV/Video
2. Piped music
3. DJ/dance music
4. TV – sport
5. Games and events
6. Comedy
7. Quizzes

8. Karaoke
9. Theatre/Drama
10. Films
11. Other (please specify)
12. Nothing
13. Don't know

qYseas **IF Q1 = 1**

Do the live music events, performances or sessions you have at this venue tend to be spread throughout the year, or do they tend to be at certain times of year?

PROBE AND CODE AS APPROPRIATE BELOW

1. Spread evenly throughout the year
2. During winter/Christmas/New Year
3. During spring
4. During summer
5. During autumn
6. Around other festival periods
7. Other (TYPE IN)
8. Don't know

qYauth

May I check, how is the STAGING OF LIVE MUSIC in this venue authorised – is it ... READ OUT AND CODE ALL THAT APPLY ...

IF NECESSARY: A Temporary Event Notice is a notification that can be given to a licensing authority in order to authorise relatively small scale (up to 499 people), occasional, short-term (up to 96 hours) events involving licensable activities. They are subject to certain restrictions.

1. covered in the premises licence (MEMBERS' CLUBS: or club premises certificate) for the venue
2. staged through temporary event notices
3. or is it exempt from licensing in some way?
4. (DO NOT READ OUT) Other (CODE & TYPE IN)
5. Don't know

qYauthX **IF QY10 = 3**

How does your venue qualify as being exempt from licensing?

(OPEN RESPONSE)

qYcond **IF QY10 = 1**

Did you have any of the following conditions or restrictions attached to your licence by the Licensing Authority in relation to live music?

READ OUT. CODE ALL THAT APPLY.

1. Restriction on timing of events (times of day/night)
2. Restriction on timing of events (time of year)
3. Doors/windows shut
4. Restriction on number of performers
5. Noise limiter installation
6. Sound-proofing required
7. Restriction on size of audience
8. Sound/noise monitoring/checking noise levels
9. Limit on number of events

10. Other conditions (please specify)
11. No conditions
12. Don't know

qYu200 **ASK UNLESS ANY ITERATIONS AT QY7 = 4 or 5**
 Can I just check, would you say that the total capacity in your venue, including all areas for putting on live music, is more than or less than 200?

1. Up to 200
2. 200 or more
3. Don't know

qY200c **ASK IF QY15a = 1**
 The Licensing Act allows certain live music conditions to be suspended in venues with a capacity of less than 200 people, in certain circumstances. This is sometimes referred to as a 'small venues exemption'. Were you aware of this allowance before?

1. Yes
2. No
3. Don't know

qYu200n **IF QY15 = 1**
 As far as you know, do these suspensions apply to your venue?

1. Yes they do
2. No they don't
3. Don't know

qYreas **IF Q1 = 1**
 What are the two or three main reasons why your venue has live music?

DO NOT PROMPT. PROBE FULLY: For what other reasons?
 CODE ALL THAT APPLY

1. Customer demand
2. Increases custom and sales
3. Profit
4. For a special occasion/event/private function
5. Personal interest
6. To provide local entertainment
7. Historic – have always put live music on
8. Got the space
9. Company policy to offer live music
10. To promote local talent
11. Like to have live music/different types of music
12. Other (please specify)
13. Don't know

qYmusi2 **IF QY9a = Don't know**
 Earlier you said that live music had been played or performed in your venue over the course of the past 12 months. May I just check, which of the following types of music have been played in your venue during that time?
 READ OUT & CODE ALL THAT APPLY

IF RESPONDENT JUST SAYS 'YES' ASK: Were these karaoke events, events with DJs, or events with karaoke and DJs?

1. DJs

2. Karaoke
3. Musicians singing and/or playing instruments live
4. Don't know

qYmusic **IF QY9a DOES NOT = Don't know**
 Earlier you said you had put on [number from QY9a] live music events or performances during the last 12 months. May I just check – in that figure, did you include any events or performances that were either:

READ OUT. CODE 'NULL' IF NONE OF THESE EVENTS.

IF RESPONDENT JUST SAYS 'YES' ASK: Were these karaoke events, events just with DJs or events with karaoke AND DJs?

1. JUST Karaoke
2. JUST DJs
3. JUST DJs AND KARAOKE
4. Don't know
5. None of these

qYdjkar **IF QY22b = 1 or 2 or 3**
 And, roughly how many of the [number from QY9a] events you said you had were events or performances that ONLY included DJs or Karaoke?

WRITE IN NUMBER.

NUMERIC RANGE (0-500)

Don't know

qY22d **IF QY9a = Don't know and Venue type = CHURCH HALL**
 And did you include any events or performances that were part of religious services?

1. Yes
2. No
3. Don't know

qY22e **IF QY9a DOES NOT = Don't know and Venue type = PLACE OF WORSHIP**
 And when you said you had put on [number from QY9a] live music events or performances during the last 12 months, did you include any events that were part of religious services?

1. Yes
2. No
3. Don't know

qY22f **IF QY22e = Yes**
 And, roughly how many of the [number from QY9a] events or performances you said you had were part of religious services?

WRITE IN NUMBER.

NUMERIC RANGE (0-500)

Don't know

SECTION P: LICENSING ARRANGEMENT UNDER THE PREVIOUS REGIME

ASK ALL

qPel

As you may be aware, the new Licensing Act came into force on 24th November 2005.

May I check, did you have a Public Entertainment Licence (PEL) under the old licensing laws, that is, before 24th November 2005 that authorised this establishment to put on live music?

1. Yes
2. No
3. Don't know

qPnoPEL

If QP1 = 2 & (QN2s = 1 OR QY1 = 3-6 OR QY1b = BEFORE 11/05)

Under what authorisation or authorisations did you put on live music under the old licensing regime? PROBE FULLY: Any other authorisations?

DO NOT READ OUT

1. Under the 2 in a bar exemption
2. Under a short term/temporary public entertainment license
3. Registered Members Club
4. Music was incidental to a religious service
5. Premises with a theatre licence
6. Music took place on Crown Land and didn't need a license
7. Without official authorisation
8. Under another authorisation or exemption (CODE & TYPE IN)
9. Don't know/can't remember

SECTION K: KNOWLEDGE ABOUT THE LICENSING ACT

The next question asks how much you feel you know about the Licensing Act that was introduced in November 2005.

ASK ALL

qk1

How much do you feel you generally know about the Licensing Act introduced in 2005? I mean not just in terms of how it relates to live music, but about all aspects of the Act? Would it be...

READ OUT

1. A lot
2. A little
3. Not very much
4. or hardly anything?

SECTION I: IMPACT OF THE LICENSING ACT

We are trying to understand specifically how the Licensing Act may have affected the live music you might provide at your venue, aside from any other factors that may affect your decision making. Please bear this in mind when answering the following questions.

- qiease** **ASK ALL**
Would you say that, on the whole, the new Licensing Act introduced in November 2005 has made it easier or more difficult for live music to be staged in this venue or has it made no difference?
- IF EASIER: Is that a little or a lot easier?
IF MORE DIFFICULT Is that a little or a lot more difficult?
1. Made it a lot easier
 2. Made it a little easier
 3. Made it a little more difficult
 4. Made it a lot more difficult
 5. Made no difference
 6. Don't know
- qinumb** **IF MORE THAN 2 YEARS AT QY1**
What impact, if any, would you say the new Licensing Act has had on the number of live music events or performances in your venue? Would you say there have been ... READ OUT ...
1. A lot more live music events or performances
 2. A few more live music events or performances
 3. A few less live music events or performances
 4. A lot less live music events or performances
 5. Or has there been no change
 6. (DO NOT READ OUT) I have stopped putting on live music
 7. Don't know
- qinumbX** **IF QI2 = 1, 2, 3 OR 4**
Can I just check, has this changed as a result of the Licensing Act, or do you think this change would have happened anyway?
1. As a result of the Licensing Act
 2. Would have happened anyway
 3. Other (specify)
 4. Don't know
- qinstea** **IF 3 OR 4 AT QI2 AND (Q1 = 1)**
What forms of entertainment, if any, have you put on instead of putting on live music in your venue? DO NOT PROMPT. PROBE: What other forms?
1. TV/video etc. - music
 2. Piped music
 3. DJ/dance music
 4. TV – sport
 5. Quizzes
 6. Karaoke
 7. Games and events
 8. Comedy

9. Theatre/Drama
10. Films
11. Other (please specify)
12. Nothing
13. Don't know

qisizeM **IF MORE THAN 2 YEARS AT QY1**
Overall, in terms of the number of musicians performing or the number of people in the bands, would you say the new Licensing Act has resulted in your venue having ... READ OUT ...

1. More people in the groups that perform
2. Less people in the groups that perform
3. No difference in the number of people in the groups that perform
4. Don't know

qisizeX **IF QI4 = 1 OR 2**
Can I just check, has this changed as a result of the Licensing Act, or do you think this change would have happened anyway?

1. As a result of the Licensing Act
2. Would have happened anyway
3. Other (specify)
4. Don't know

qiacts **IF MORE THAN 2 YEARS AT QY1**
Overall, in terms of the number of different live music acts performing on a particular night or event, would you say the new Licensing Act has resulted in your venue having ... READ OUT ...

1. Many more acts
2. Somewhat more acts
3. Somewhat fewer acts
4. Much fewer acts
5. Or has it made no difference to the number of acts that you have
6. Don't know

qiactsX **IF QI5 = 1, 2, 3 OR 4**
Can I just check, has this changed as a result of the Licensing Act, or do you think this change would have happened anyway?

1. As a result of the Licensing Act
2. Would have happened anyway
3. Other (specify)
4. Don't know

qimin **IF Q1 = 1**
Typically, what is the range of the size of bands or acts you have performing live in your venue? Please tell me the smallest and largest number of musicians you typically have playing in your venue.

RECORD SMALLEST & LARGEST NUMBER
Don't know

- qidiver** **IF MORE THAN 2 YEARS AT QY1**
Overall, in terms of the diversity of Acts you have performing or genres being performed, would you say the new Licensing Act has resulted in your venue having ... READ OUT
1. Much more diversity
 2. A little more diversity
 3. A little less diversity
 4. Much less diversity
 5. Or has it made no difference to the diversity of Acts performing or genres being performed
 6. Don't know
- qidiveX** **IF QI6b = 1, 2, 3 OR 4**
Can I just check, has this changed as a result of the Licensing Act, or do you think this change would have happened anyway?
1. As a result of the Licensing Act
 2. Would have happened anyway
 3. Other (specify)
 4. Don't know
- qI7a** **IF MORE THAN 2 YEARS AT QY1**
And do you think the Licensing Act has had an impact on the size of audiences at the live music events or performances that your venue puts on?
1. Yes
 2. No
 3. Don't know
- qisizeA** **IF YES AT QI7a**
And would you say the Licensing Act has resulted in live music in your venue having ... READ OUT ...
1. Much large audiences
 2. Somewhat larger audiences
 3. Somewhat smaller audiences
 4. Much smaller audiences
 5. Don't know
- qisizAX** **IF QI7 = 1, 2, 3 OR 4**
Can I just check, do you think that this has changed as a result of the Licensing Act, or do you think this change would have happened anyway?
1. As a result of the Licensing Act
 2. Would have happened anyway
 3. Other (specify)
 4. Don't know
- qIma** **IF MORE THAN 2 YEARS AT QY1**
And would you say the new Licensing Act has had any impact on the customer profile of your live music audience?
1. Yes
 2. No
 3. Don't know

- q1ma2** **IF Q1ma = 1**
 What impact would you say the new Licensing Act has had on your venue's live music audience?
- WRITE IN
- OPEN RESPONSE
- qcx** **IF Q1ma = 1**
 Can I just check, do you think that this has changed as a result of the Licensing Act, or do you think this change would have happened anyway?
1. As a result of the Licensing Act
 2. Would have happened anyway
 3. Other (specify)
 4. Don't know
- qicause** **IF YEAR AT QN2d = 2006 OR 2007 OR 2005 OR QY1d = 2**
 May I just check, did the Licensing Act influence your decision to stop staging live music?
1. Yes
 2. No
 3. Don't know
- qicausm** **IF Q112 = 1**
 And was Licensing Act the main reason for your decision to stop staging live music?
1. Yes
 2. No
 3. Don't know
- qiimpro** **IF Q1 = YES OR QN2 = YES**
 Based on your knowledge and experience of the Licensing Act, what, if anything, do you think the Government could do to improve the Act in relation to the staging of live music in venues like yours?
- PROBE FULLY: How else do you think the Act could be improved in relation to the staging of live music in venues like yours?
- (OPEN RESPONSE)
- qiposne** **ASK IF (Q1=1 or QN2=1) OR (Q1=2 AND QN4=1-3) (those who have put on live music or those who haven't but would consider it in the future)**
 All things considered, do you feel that the new Licensing Act has had a positive impact, a negative impact or no impact at all on staging live music in your venue?
- IF 'POSITIVE' ASK: Is that very or slightly? IF 'NEGATIVE' ASK: Is that very or slightly?
1. Very positive impact
 2. Slightly positive impact
 3. Slightly negative impact
 4. Very negative impact

5. Had an impact but neither positive nor negative
6. No impact
7. Don't know

IF CODES 1, 2, 3, 4, 5 at QI10

qipos/neg/none

Why do you say that?

PROBE FULLY: For what other reasons?

(OPEN RESPONSE)

qiex

ASK ALL

Are you aware that there is an exemption in the Licensing Act for any live or recorded music that is "incidental" – for example, music played in the background which does not predominate over the main activities?

IF RESPONDENT ASKS YOU WHAT INCIDENTAL MUSIC IS READ OUT THE FOLLOWING: There is no fixed definition of what constitutes 'incidental music' as it will depend on the differing circumstances where the music is being performed. Licensing Authorities advise whether live music is 'incidental' on a case by case basis.

1. Yes
2. No

IF QYex = 1

qiex2 Do you ever use this exemption?

1. Yes
2. No
3. Don't know

qiprof

ASK ALL

More generally would you say the new Licensing Act has had any impact on your venue's customer profile? This is your venue's customer profile as a whole, not just the profile of your live music audience.

1. Yes
2. No
3. Don't know

qiprofW

IF QI8 = 1

What impact would you say the new Licensing Act has had on your venue's customer profile?

WRITE IN

OPEN RESPONSE

ASK IF (Q1=1 or QN2=1) OR (Q1=2 AND QN4=1-3) (those who have put on live music or those who haven't but would consider it in the future)

qismoke Now thinking about the smoking ban that has recently been introduced...

How, if at all, do you think the smoking ban introduced on July 1st in England and April 1st in Wales will affect any live music you might provide at your venue?

OPEN RESPONSE

qY30 **DELETED**

ASK ALL

Now thinking generally about live music, and not just specifically in relation to the Licensing Act

qY25a **ASK ALL**

Aside from anything you have already mentioned, what would encourage you to put on [live music/more live music] in your venue?

(OPEN RESPONSE)

Demographics

ASK ALL

qXsex CODE RESPONDENT'S SEX

1. Male
2. Female

Finally I just need to ask you a couple of questions about yourself

qXage What was your age at your last birthday?

NUMERIC RANGE (16-99)
Refused

qXlong And for how many years have you been responsible for live music at this venue?

PROMPT TO PRECODES

1. 6 months or less
2. More than 6 months, up to a year
3. More than 1 year, up to 2 years
4. More than 2 years, up to 5 years
5. More than 5 years, up to 10 years
6. More than 10 years, up to 15 years
7. More than 15 years, up to 20 years
8. More than 20 years, up to 25 years
9. More than 25 years
10. Don't know
11. Refused

qrecon1 Occasionally we need to speak to people more than once. If we need to come back to you with any questions relating to this survey or to help with other connected research, would you be willing to help us?

IF NECESSARY ADD: You can be assured that your name will never be passed to anyone outside our organisation without your permission. Taking part in Market Research will never result in anyone trying to sell you anything.

1. Yes
2. No
3. Don't know

qrecon2 And if the Department for Culture, Media and Sport wanted to conduct a follow-up to this study, would you be willing for us to pass on your contact details to another research organisation like ourselves?

1. Yes
2. No
3. Don't know

THANK AND CLOSE

Appendix C: *Taking Part* data

Data from Year 1 Q1 dataset of Taking Part

Strategy Division, Department for Culture, Media and Sport, November 2007

Attendance at jazz and other live music

	%	Range - lower	Range - upper	Population
Jazz	5.8	5.04	6.61	2,348,859
Other live music (except classical)	23.5	22.03	24.87	9,459,898
Jazz or other live music	26.4	24.96	27.91	10,663,855

Venue types (asked of those who attended other live music)

	%	Range - lower	Range - upper	Population
Pub/bar	37.8	34.27	41.38	3,578,152
Hotel	3.8	2.44	5.26	364,158
Restaurant/café	8.7	6.63	10.77	822,809
Small club	25.7	22.49	28.90	2,430,757
Medium to large live music venue	57.4	53.81	61.06	5,433,354
Clubs and associations (private)	10.1	7.86	12.27	952,296
Student Union	6.0	4.25	7.73	566,429
Church halls/community centres	10.6	8.37	12.89	1,005,535
Park/field	34.2	30.72	37.68	3,235,039
Other	9.5	7.39	11.70	902,935
"Secondary" venue	56.7	53.0	60.3	5,365,444

Attendance at jazz or other live music by region

	%	Range - lower	Range - upper	Population
North East	24.3	19.91	28.76	499,577
North West	23.1	19.44	26.84	1,274,690
Yorkshire & Humberside	23.2	18.78	27.64	938,639
East Midlands	29.6	24.71	34.47	1,013,644
West Midlands	23.2	19.04	27.37	987,477
East of England	30.5	25.37	35.59	1,345,962
London	25.3	20.64	30.02	1,498,194
South East	28.9	24.62	33.26	1,916,127
South West	29.1	24.71	33.41	1,189,544
Total	26.4	24.96	27.92	10,663,854

Note: "Secondary" venue is defined as: pub/bar; hotel; restaurant/café; small club; clubs and associations (private); Student Union; church halls/community centres.

Data from Year 2 Q1 dataset of Taking Part

Strategy Division, Department for Culture, Media and Sport, November 2007

Attendance at jazz and other live music

	%	Range - lower	Range - upper	Population
Jazz	5.9	5.2	6.6	2,354,152
Other live music (except classical)	24.6	23.3	25.8	9,753,947
Jazz or other live music	27.5	26.2	28.8	10,911,549

Venue types (asked of those who attended other live music)

	%	Range - lower	Range - upper	Population
Pub/bar	33.2	30.3	36.0	3,234,202
Hotel	4.2	3.0	5.4	407,271
Restaurant/café	6.4	4.9	7.8	619,968
Small club	22.1	19.6	24.6	2,156,246
Medium to large live music venue	60.9	57.9	63.8	5,935,932
Clubs and associations (private)	9.4	7.6	11.2	916,480
Student Union	4.9	3.6	6.2	478,733
Church halls/community centres	10.0	8.2	11.8	973,427
Park/field	28.9	26.1	31.6	2,814,991
Other	1.3	0.6	2.0	510,211
"Secondary" venue	52.1	49.1	55.2	5,080,843

Attendance at jazz or other live music by region

	%	Range - lower	Range - upper	Population
North East	26.1	22.0	30.2	518,387
North West	26.4	22.6	30.2	1,409,437
Yorkshire & Humberside	27.7	23.8	31.6	1,101,058
East Midlands	29.5	25.4	33.5	1,001,459
West Midlands	24.7	21.0	28.5	1,038,757
East of England	29.8	25.6	34.1	1,308,134
London	21.1	18.0	24.2	1,236,725
South East	30.1	26.5	33.8	1,962,277
South West	32.9	28.5	37.3	1,335,315
Total	27.5	26.2	28.8	10,911,549

Note: "Secondary" venue is defined as: pub/bar; hotel; restaurant/café; small club; clubs and associations (private); Student Union; church halls/community centres.