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National Lottery Project Grants: Supporting Grassroots Live Music Evaluation report

March 2023

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Some words about the hub

This evaluation report was produced by the hub, a team of thinkers and doers committed to building the capacity of the music sector that we've grown up in, and continue to be part of. As well as working with clients on research and strategy projects, we develop our own 'hub lab' programmes, that support artists and other creative freelancers and entrepreneurs to have happier, healthier and more sustainable careers and businesses. You can find out more about us [here](#).

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Contents

Executive summary 4

1. Introduction 11

- 1.1 About the Supporting Grassroots Live Music Fund 12
- 1.2 About our research 14
- 1.3 Methodology 15
- 1.4 About this report 15

2. About applicants to the SGLM Fund 16

- 2.1 Key demographics 17
- 2.2 Their engagement with the Fund 18
- 2.3 Applicants' prior engagement with the Arts Council 18
- 2.4 The challenges they face 19
- Case study 1: Komedia Bath 22

3. The Fund's impact on respondents' activity and models 23

- 3.1 Significant and widespread impact 24
- 3.2 A real boost for artist and programme development 27
- 3.3 Widespread impact as well in terms of audience development 28
- 3.4 A big focus on improving their physical infrastructure 29
- 3.5 Evidence of some impact re financial resilience or new business models 30
- 3.6 Enhancing their contribution to place making 33
- 3.7 Few thought these impacts would have been unlocked without the Fund, but there was concern about sustaining this 34
- Case study 2: Matt and Phred's, Manchester 35

4. Feedback about the application process 36

- 4.1 Most had support; those who didn't were less likely to have made successful applications 37
- 4.2 Feedback is broadly positive, but there are concerns about the application form and follow up to unsuccessful applications 38
- Case study 3: Electronic Sound magazine, Norwich 41

5. Impact on their relationship with Arts Council England 42

- 5.1 Exploring shifts in applicants' understanding of, and engagement with, Arts Council England 43
- 5.2 Feedback about the Arts Council's engagement with grassroots music 43
- 5.3 Understanding around Arts Council funding and its criteria 44
- Case study 4: Forum Music Studios, Darlington 47

6. Sector body feedback 48

- 6.1 Recognition and praise for the Arts Council having developed the Fund 49
- 6.2 A perceived learning curve for all concerned, including those offering support 49
- Case study 5: Baby Rock Sampler, Manchester 50

7. What next? Applicant and industry body thoughts 51

- 7.1 Exploring applicant and industry body thoughts about potential post-SGLM Fund support 52
- 7.2 Apply the learning from the Fund and monitor future developments 52
- 7.3 Make application processes and resources as simple, inclusive and relevant as possible 52
- 7.4 Work more closely with industry bodies and develop a more joined up approach 53
- 7.5 Look at other capital funding possibilities 53
- Case study 6: Team Black Promotions at the Hope & Ruin, Brighton 54

8. Conclusion 55

- 8.1 What a few years it's been 56
- 8.2 Some final reflections on our findings 56
- 8.3 Exploring what the Arts Council can do to support grassroots live music once the Fund closes 57

Appendix 1: Methodology and sample frame variables and values 58

Executive summary

Executive summary

1. Introduction

An introduction to the Fund

Supporting Grassroots Live Music (the Fund) is a time-limited intervention that is part of Arts Council England's (the Arts Council) National Lottery Project Grants (NLPG) programme. Launched in 2019, and due to run until the end of March 2023, it supports applications from those whose work focuses on the hosting and promotion of live music events in venues, with applicants able to apply for grants of £1-40K.

Brexit was already a concern for the music sector, but little did anyone know that the Fund's launch would be followed by the declaration of a pandemic, whose impact is still very much evident. Against this backdrop and more recent concerns about the cost of living, by July 2022 the Fund had invested £6m+¹ in 250+ projects.

Short-term applicant-related outcomes identified in the Fund's theory of change, were for applicants to:

- Become familiarised with Arts Council criteria and processes for applying for funding.
- Improve their infrastructure, buildings and policies.
- Test new ideas relating to their business models.
- Diversify their activity and programmes.
- Test new ways of increasing opportunities for young, emerging and/or diverse artists.
- Develop new relationships/partnerships.
- Test new ways of developing audiences.

In addition, outcomes in relation to key sector bodies were that they would:

- Be better able to advise members around Project Grant applications.
- Recognise the Arts Council as a supporter of the grassroots music sector.

Our brief and methodology

In Spring 2022, Arts Council England commissioned the hub to conduct a process and impact evaluation of the Fund, the aims of which were:

- To look back at funding to date to evaluate and understand how effective the Fund had been in meeting its original aims and outcomes, and whether it had had the intended impact.
- To look forward, informing how the Arts Council might continue to support grassroots music venues and promoters beyond the life of this ring-fenced fund.
- To identify any learning that can be derived from this time-limited intervention that could inform the Arts Council's work with other sectors and other time-limited priorities.

Our research took place between March 2022 and July 2022, and our methodology included the following:

- Analysis of Fund application and monitoring data.
- Applicant survey: distributed to 465 applicants in April 2022 (82 respondents; 18% response rate).
- Focus groups: 3 focus groups in July 2022 with 19 successful and unsuccessful applicants.
- 10 interviews with successful/unsuccessful applicants; 7 with industry body representatives (July 2022).

Published in March 2023, this report contains: key information about Fund applicants and our respondents; findings from our applicant survey, focus groups and interviews, about the Fund's impact and Arts Council processes; sector body feedback about the Fund and Arts Council England; research participant views on the future of Arts Council support for grassroots music, and some conclusions about what could potentially happen next, in light of the Fund's planned closure in March 2023.



Photography by Amber Mylius-King

¹ The value of SGLM Fund awards made by July 2022 totalled £6.06m. By the time of this report's publication in March 2023, this figure had increased to £7.23m, via 378 awards.

About applicants to the Fund and our respondents

Key details about applicants to the Fund and our respondents are:

- 48% (39) of respondents worked for venues, 35% (28) were promoters, 10% (8) producers, 4% (3) musicians.
- 32% (148) of applicants were female; 22% (102) Black, Asian or ethnically diverse, 10% (47) LGBT, 8% (35) disabled; broadly similar to the Arts Council's NLPG and Developing Your Creative Practice programmes.
- 40% (256) of the 640 applications made by March 2022 were successful, 24% (154) unsuccessful, 36% (230) ineligible. Discounting ineligible applicants gives a 62% success rate.
- Arts Council data indicated 51% of applicants (237) had applied to the funder before.

2. Key findings

Significant success in terms of key outcomes and broader, unanticipated, impacts

"The Arts Council probably saved our business over the last few years."

Independent promoter, based in South East

Two thirds of respondents (66%/54) said the SGLM Fund had been a lifeline for grassroots music promoters and/or venues.

Recipient feedback suggested the Fund had unlocked many anticipated outcomes and had a wider impact on their financial resilience and contribution to place-making. There was evidence too of it unlocking impacts directly related to the Arts Council's Let's Create strategy ².

Key outcomes – an overview ³

- **80% (45) respondents had supported more artists, 63% (35) had supported a more diverse range of artists and 59% (33) worked with higher quality artists.**
- **63% (35) were programming a wider range of genres;** 34% (19) had produced more streamed/WOD content.
- **59% (33) had developed a more diverse audience, and 43% (24) a younger audience.**
- **64% (36) had engaged more with local individuals and/or groups; 63% (35) developed crucial new relationships/networks.**
- **46% (26) had improved their sound/lighting equipment, 29% (16) their environmental performance, and 13% (7) their venue accessibility.**
- **38% (21) had developed new income streams; 45% (25) described themselves as more financially resilient and 41% (23) had changed their long-term business models.**

Exploring outcomes and areas of impact in more detail

Widespread impact in terms of diversifying recipients' activity and programmes

With 80% of respondents (45) in receipt of a SGLM award having supported more artists, this was the Fund's most commonly reported area of impact. Diversifying your programme can be risky for venues and promoters hugely reliant of ticket sales. However, thanks to the Fund, some two thirds – 63% (35) - had supported a more diverse range of artists, and the same proportion programmed a broader range of genres.

Impact too in terms of developing audiences

Survey findings suggested that a significant proportion of Fund recipients had developed new audiences. Amongst recipients, 59% (33) had developed a more diverse audience as a result of their award, and 43% (24) a younger audience. Feedback suggested that for the majority this was about making changes to their programming and wider community offer, rather than to their marketing.

A significant proportion had improved their infrastructure, catalysing a much wider impact

"The Fund has enabled us to buy and install new equipment and support more grassroots music.... It's opened up our ability to promote, diversified our programme a lot."

Venue rep, based in South West

Nearly half of recipients surveyed - 46% (26) – had improved their sound and/or lighting equipment, while 29% (16) had improved their environmental performance and 1 in 6 (13%/7) had made their venues more accessible to D/deaf and/or disabled artists or audiences. Focus group discussions highlighted how improving basic infrastructure had enabled many to diversify and increase the number of artists they work with, which in turn often leads to larger and/or more diverse audiences, and in some cases, increased turnover. More broadly, there was significant evidence of how this kind of investment can unlock a range of impacts directly relevant to the Arts Council's **Let's Create strategy**.

Some success in enabling respondents to test new ideas relating to their business model and build their financial resilience

"By next year, we'll potentially have a totally different business model."

Independent promoter, based in South East

Survey feedback suggested that for around half of recipients the Fund had not only had the hoped-for outcome in terms of enabling them to test new ideas for their business models, but that – despite the pandemic - it had also enabled them to improve their financial resilience and develop new relationships now crucial to their survival.

Key findings here included:

- **34% (19) of recipients** surveyed had produced **more live streamed/watch on demand content**.
- **Nearly two thirds (63%/35) had developed new relationships** crucial to their survival. In an industry where relationships are 'currency', it's another example of how likely the Fund is to have lasting legacy.
- The innovation the Fund had unlocked is evidenced by **41% (23) having changed their long-term business/operating model** as a result of the Fund.
- In terms of unanticipated outcomes, **45% (25) had become more financially resilient** as a result of their award, and **38% (21) had developed new income streams**.

How the Fund had impacted finances and/or business/operating models

Developed new partnerships/networks crucial to survival

63%

Become more financially resilient

45%

Changed long term business/operating model

41%

Developed new income streams

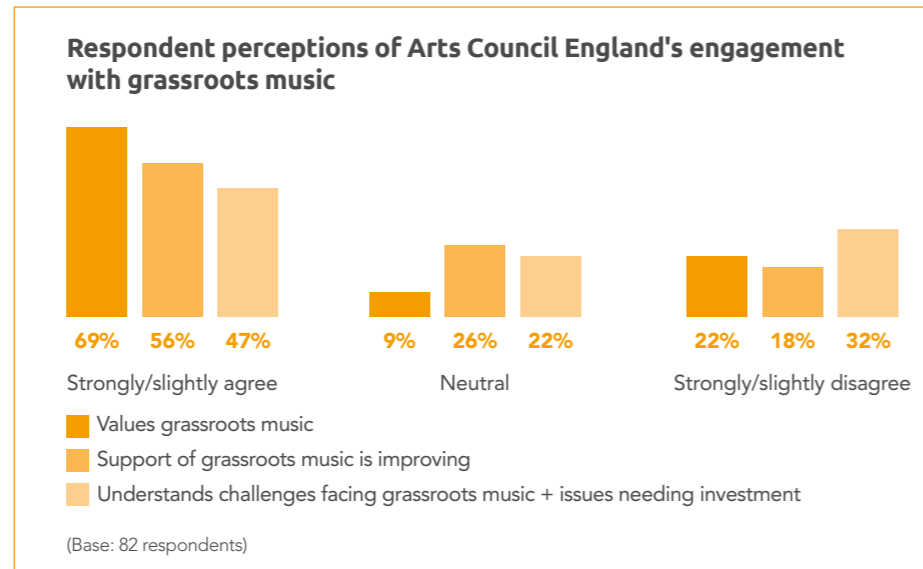
38%

(Base: 56 respondents [successful applicants])

Shifts in applicants' perceptions of, and engagement with, Arts Council England

The majority felt valued and thought the Arts Council's support of grassroots music was improving, but some thought the Arts Council needed to deepen its understanding

A key evaluation question we explored was whether the Fund had helped change perceptions of the Arts Council amongst grassroots music venues and promoters. To do this, we asked respondents for feedback about Arts Council England's engagement with the grassroots music sector, collecting views about the extent to which they felt it valued the sector and understood the issues it faced, alongside views on whether its support of grassroots venues and promoters was improving. The diagram here summarises headline feedback.



Reflecting the impact the Fund had had, feedback about the Arts Council's engagement with the grassroots music sector was very positive. Key findings were:

- **7 out of 10 respondents (69%/57) said they believed the Arts Council values grassroots music.**
- Equally encouraging, just over half – **56% (46) – believed the Arts Council's support of grassroots music was improving**, three times the number who disagreed (18%/15).
- **Three quarters (73%/60) would recommend the Fund** to others working in grassroots music.
- **Some weren't sure the Arts Council understood the sector's key challenges** and issues that needed investment; whilst 47% (38) believed it did understand these, almost a third disagreed. Anecdotally, this appeared to relate more to perceptions of its understanding of everyday issues than understanding of any bigger industry picture.

Many were more familiar with Arts Council funding criteria and processes, more likely to apply and thought they had the skills to do so, but there was still concern about the Fund's closure

While 51% (42) of respondents said they had increased their awareness of other relevant Arts Council funding, nearly a quarter – 22% (18) – said they hadn't, and the remaining 27% (22) weren't sure. Taken together, this suggested there was work for the Arts Council to do in terms of raising awareness levels.

Turning to whether they were consequently more likely to apply for such funding, some 65% (53) said they were now more likely to do so, with 47% (39) more likely to apply specifically for a NLPG award. Furthermore, nearly 7 out of 10 – 65% (53) - felt they had the skills and understanding to make a strong application to the Arts Council.

However, focus group participant and interviewee feedback suggested that this confidence was dented by the prospect of competing in a bigger field of applicants for mainstream NLPG funds. Here, the hope remains that the fact the Fund has been delivered as a ring-fenced strand of NLPG means that these fears will be largely unfounded, something which can be tracked in future via application data and success rates.

Exploring process-related feedback and related outcomes

"(It was) very challenging. At times I almost gave up. It was all new – putting pen to paper, understanding the questions, knowing what was required. I didn't feel very confident initially, but that changed over time. By my 3rd application (my 2nd successful one), I felt much better."

Independent promoter based in North

Two thirds had support to apply, but those yet to succeed were less likely to have accessed support

Respondent feedback confirms how valuable having external support was to applicants. Over 8 out of 10 (82%/46) respondents who'd made at least one successful application had some form of support. In sharp contrast, this fell to just 45% (29) amongst those who'd made an unsuccessful application, meaning that unsuccessful applicants were three times more likely to have received no support at all.

Mixed feedback about guidance support and application forms suggested room for improvement

Looking at what respondents thought had worked well and what hadn't, feedback about the Arts Council's applicant guidance was mixed, with those giving it a positive score (39%/32) outnumbering those who didn't (27%/22). When asked how it could be improved, comments mainly focused on the Arts Council using simpler language, with others suggesting music-specific guidance would be helpful, especially for novice applicants.

Meanwhile, a quarter (20) described the application form as "really bad" and another 18% (15) as "pretty bad". Conversely, just 27% (22) thought it was "good". Amongst applicants with whom we spoke, the latest iteration of the form received the worst feedback, with comments in the main being about its complexity and primary focus on the Arts Council's new Outcomes and Investment Principles.

However, feedback about support from the Arts Council team was largely positive

Turning to other aspects of the application and assessment process, the Arts Council's customer service team received the most widespread positive feedback; 80% of respondents (66) had engaged with it, of whom 51% (34) rated it as "pretty/ really good". Feedback about the 1-1 support respondents received from music relationship managers was positive too, and suggested that 55% (45) had accessed this, amongst whom nearly half - 49% (22) - described their engagement as "really" or "pretty good", and 33% (15) as "pretty" or "really bad".

In terms of what appears to have not worked so well, the feedback – or, anecdotally, lack of such feedback – that respondents received from the Arts Council after making an unsuccessful application came in for the strongest criticism, with those describing it as "bad" outnumbering by 3 to 1 those who rated it as "good".

Exploring sector body feedback and related outcomes

Recognition and praise for the Arts Council having developed the Fund

"A really vital intervention... that plugged a market need and made it clear they were taking that bit of the sector seriously."

Amongst industry body representatives we consulted, there was widespread praise for the Arts Council for having created and delivered the Fund, and a recognition of the Arts Council's support for grassroots live music. Picking up on another outcome, some suggested it had done much to counter the more widespread negative reputation the Arts Council had had for decades amongst those working in grassroots music, in light of what they perceived as an almost exclusive support of Western classical music.

A perceived learning curve for all concerned in terms of offering support

"It took a while to learn how to do it, how to get the Arts Council to get it, because the assessors didn't understand the sector."

Amongst industry reps who'd supported applicants with SGLM bids, there was a strong sense that the Fund had been a learning curve for all concerned. In terms of whether they were better able to advise people on applying, a number talked about how it had taken time for venues and promoters to understand what the Arts Council meant and needed and vice versa, and for them as support workers to be able to facilitate that. Several described part of their role as being that of a translator.

Conclusion

Considerable success in terms of the Fund achieving its expected outcomes and aims

The Fund's impact has been significant; over £6m invested in 250+ applications by July 2022⁴, and little doubt that the Fund has not only achieved its key aims and outcomes, but also unlocked some unanticipated outcomes. No surprise really then that over two thirds of survey respondents felt the Fund had "been a lifeline for grassroots venues and promoters".

From solo promoters to businesses with teams promoting 300+ shows a year, the Fund has enabled a diverse range of recipients to diversify their programmes; increase their support for young, emerging and/or more diverse artists; test new ways of developing their audiences; improve their physical infrastructure, and test new ideas around their business models. In terms of unanticipated outcomes, nearly half of those we surveyed who'd received an award through the Fund said they're more financially resilient as a result, with a similar proportion having developed new income streams as a consequence of the Fund.

The breadth of these impacts testifies to applicants having used their funding to pivot their activity during the pandemic, and to the Fund having catalysed a more general focus on 'business not as usual'. It also highlights the inter-dependence of many of these outcomes, and makes clear the connection between investment in grassroots venues' and promoters' physical infrastructure and their ability to make a real contribution to the Arts Council's **Let's Create** strategy. It's confirmed how investing in venues and promoters has a significant 'ripple' effect, unlocking outcomes for artists and others working in the grassroots music ecology, and creating jobs and other economic impacts. Set against the backdrop of a pandemic, this feedback is particularly noteworthy.

Whilst this is all positive news, we sound a note of caution about the challenges facing grassroots venues and promoters at present. The 'double whammy' of the impact that Covid continues to have on audience numbers and box office receipts, along with increased energy costs and the broader cost of living crisis means the immediate future looks extremely challenging.

Beyond exploring the Fund's impact, a key focus of our evaluation was on whether the Fund had helped change perceptions amongst the grassroots live music sector that the Arts Council isn't supportive of them. It's encouraging then that nearly 7 out of 10 of applicants who took part in our survey thought the Arts Council values grassroots music, and more than half that its support of grassroots music is improving.

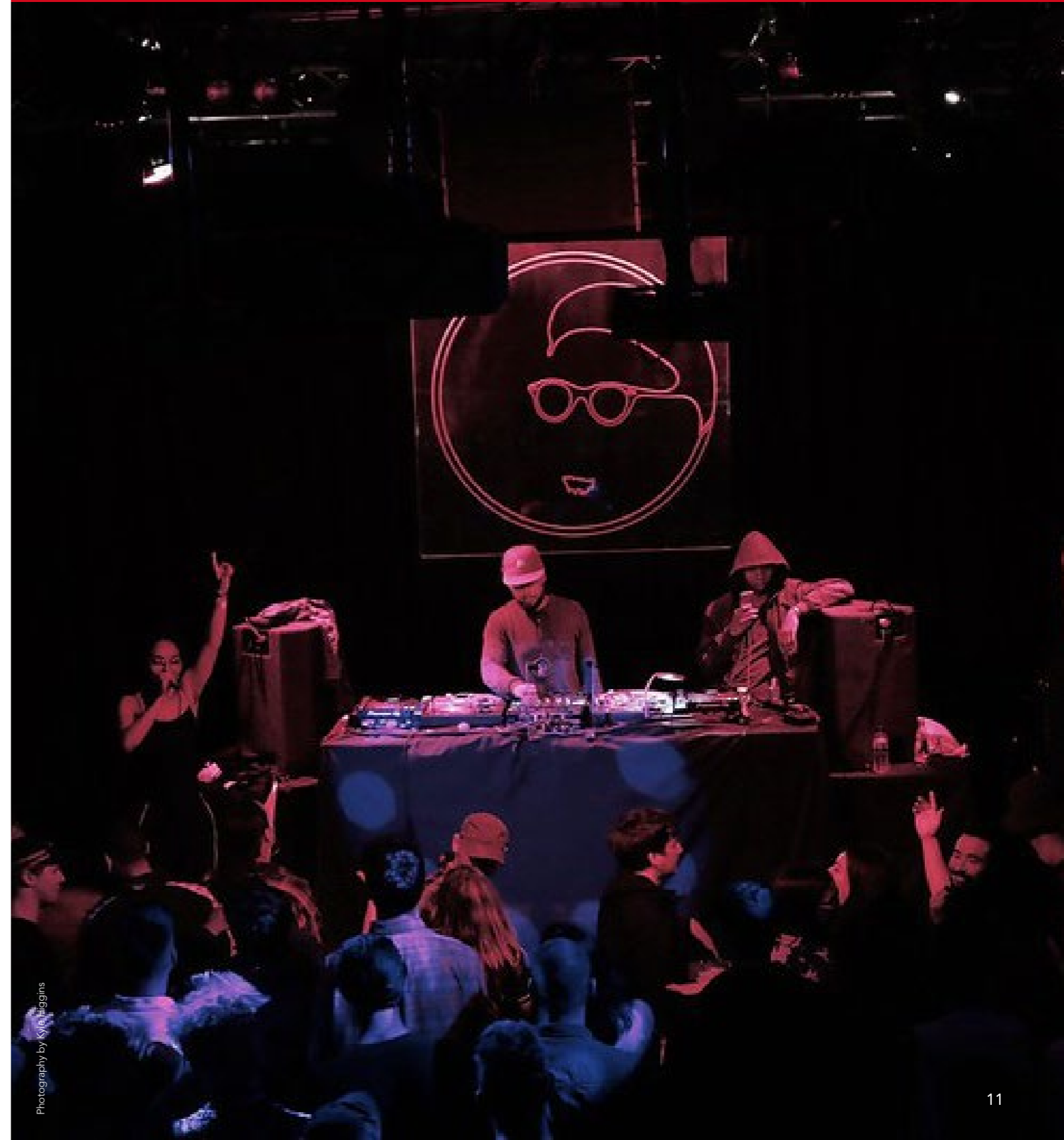
We were also asked to capture feedback about the Fund's application and assessment process to help understand what can be learnt from the delivery of this ring-fenced Fund. There were, of course, some concerns. Many indicated they found the latest iteration of the NLPG application form unhelpful and hard to complete, and Grantium extremely frustrating. Meanwhile, comments made by unsuccessful applicants suggested they would have benefitted from receiving more feedback, and that in some cases the lack of such feedback was a real barrier to re-applying. With respondents whose applications were unsuccessful three times as likely to have had no support as those who've received an award, feedback attests to how important it is that new applicants not versed in the language of the Arts Council get the support they need. Here, the work done by staff at the Arts Council and Music Venue Trust was important and highly valued.

The value this support has had is measured in terms of applicants' increased skills and confidence in their ability to apply for Arts Council funding; another question we were asked to explore in this evaluation. Whilst this confidence was dented by the prospect of competing outside of a ring-fenced fund, the training ground that SGLM has provided precisely because it was delivered within National Lottery Project Grants, means that we hope such fears are misplaced.

Exploring what the Arts Council can do to support grassroots live music once the Fund closes

In exploring what the Arts Council can do to effectively support the grassroots live music sector once the Fund has closed, we've taken into account feedback that its closure may be viewed by many grassroots venues and promoters as evidence that the Arts Council no longer values what they do. In light of this, and given longer-term outcomes identified in the Fund's theory of change, a priority must be ensuring that such venues and promoters are as equipped as possible to make successful applications to mainstream NLPG funding. To do this, we recommend that the Arts Council creates a transition period strategy and action plan, that includes the development of an appropriate set of accessible and relevant resources for applicants alongside a clear sector-facing communications campaign.

1. Introduction



1. Introduction

1.1 About the Supporting Grassroots Live Music Fund

An introduction to the Fund

Supporting Grassroots Live Music (SGLM) is a time-limited intervention that is part of Arts Council England's open-access programme for arts, museums and libraries projects: National Lottery Project Grants (NLPG). Launched in May 2019, and extended until the end of March 2023, SGLM (the Fund) can support applications from organisations and individuals whose work focuses on the hosting and promotion of live music events in venues. Applicants can apply for SGLM grants of between £1-40K to support activities that help them deliver and develop their work, getting live music to more people across England.

Whilst Brexit was already a concern for many in the music sector, little did the Arts Council – or any of us – know that the Fund's launch would be followed some six months later by the emergence of the Covid virus and subsequent declaration of a pandemic, whose impact is still very much evident. Against this backdrop, and ongoing concerns about inflation, rising energy costs and a broader cost of living crisis, Arts Council England had by July 2022 invested over £6m⁵ in more than 250 SGLM-funded projects.

	Applications received	Eligible applications	Eligibility rate	Awards made	Success rate	Value of awards
2019/20	201	156	78%	101	65%	£ 1,839,445.00
2020/21	217	149	69%	79	53%	£ 1,377,412.00
2021/22	302	242	80%	100	41%	£ 1,985,039.00
2022/23 ⁶	120	112	93%	41	37%	£ 858,298.00

In line with wider NLPG funds, the Fund was paused for Covid between 23 March – 20 July 2020, during which time potential SGLM Fund applicants were instead able to apply for Cultural Recovery Fund support.

The context for the Fund

Often described as the 'research and development' department of the music industry, grassroots music venues and promoters are crucial to the development of musicians and music audiences alike across the country. Arts Council England developed the Fund in recognition of the limited experience and confidence venues and promoters had in applying for public funds, the significant challenges they understood such individuals and organisations were facing, and the impact these were having on their ability to develop their programmes, audiences and business models.

With many grassroots music venues and promoters having never applied to Arts Council England before, the programme was also designed to help them develop the knowledge, experience and confidence to progress to making NLPG applications in the future. As the Fund's final year, 2022/23 was intended to act as a transition year to support more grassroots venues and promoters – especially those who'd not yet had Arts Council England funding - to gain experience of applying for and delivering a funded project.

Anticipated outcomes

The following were identified as anticipated outcomes in the Fund's most recent theory of change:

Short-term Outcomes	Medium to long-term Outcomes
<p>Grassroots music venues and promoters</p> <ul style="list-style-type: none"> - Become familiarised with Arts Council criteria and processes for applying for funding. - Improve their infrastructure, buildings and policies. - Test new ideas relating to their business models. - Diversify their activity and programmes. - Test new ways of increasing opportunities for young, emerging and/or diverse artists. - Develop new relationships/partnerships. - Test new ways of developing audiences. <p>Key sector bodies</p> <ul style="list-style-type: none"> - Be better able to advise members around Project Grant applications. - Recognise the Arts Council as a supporter of the grassroots music sector. <p>Arts Council staff</p> <ul style="list-style-type: none"> - Understand issues facing grassroots live music sector and how to support them. - Understand the value of the sector. - Understand how public funding best invested to support it. <p>Media</p> <ul style="list-style-type: none"> - Picks up the fact that the Arts Council is investing in the sector and shifts narrative. 	<p>Grassroots music sector</p> <ul style="list-style-type: none"> - Sector feels valued by the Arts Council England. - Sector is able to submit competitive Project Grant applications. - Sector is more creative, dynamic and willing to test new approaches to delivery. - Sector knows how to optimise business models and test new funding and partnership approaches. - A network of more sustainable and resilient grassroots music venues across the country better equipped and able to provide for D/deaf, disabled and neurodivergent artists/audiences. - More grassroots live music events, across a wider range of genres. - New audiences for grassroots live music. - Greater opportunities for a range of young, emerging and/or diverse artists and creatives to develop their talent and showcase it to live audiences and/or to develop sector careers. - Shift in perception of range of music genres the Arts Council is prepared to support. <p>Arts Council England</p> <ul style="list-style-type: none"> - Arts Council demonstrates improved understanding of the issues facing sector. - Arts Council and sector have shared agendas to effect change, collaborate to shape approaches and shared understanding of how public investment is best targeted.

1.2 About our research

Brief and aims

In March 2022, Arts Council England commissioned the hub to conduct a process and impact evaluation of the SGLM programme. The aims of the evaluation were three-fold:

- To look back at funding to date to evaluate and understand how effective the programme has been in meeting its original aims and outcomes (as outlined above), and whether it has had the intended impact.
- To look forward, informing how the Arts Council might continue to support grassroots music venues and promoters beyond the life of this ring-fenced fund.
- To identify any learning that can be derived from this time-limited intervention that could inform the Arts Council's work with other sectors and other time-limited priorities.

Key evaluation questions

Arts Council England identified the following as key evaluation questions:

Impact evaluation

- To what extent has the programme achieved the expected outcomes and met its original aims?
- Has the programme helped promoters and venues explore new and/or more sustainable business models and ways of working?
- Has the programme helped develop a better understanding within the Arts Council around the value of grassroots live music venues and how we can appropriately support them?
- Has the programme helped change perceptions amongst the grassroots live music sector that the Arts Council is not supportive of them?
- Has the programme improved confidence in applying and improved the quality of applications from the grassroots live music sector? Have successful applicants subsequently been successful within the regular Project Grants programme?

Process evaluation

- What can be learned from how this ring-fenced fund has been delivered? What is working well, and less well, for whom and why? (e.g., funding level, eligibility criteria, permission to apply for capital forms). Were there benefits to delivering this intervention as a ring-fenced strand of Project Grants rather than as a standalone funding programme?
 - What barriers did unsuccessful applicants face in re-applying? Would anything in particular have helped them to take the appropriate next steps?
 - What can the Arts Council do to continue to effectively support the grassroots live music sector once this ring-fenced fund finishes?
-

1.3 Methodology

Our research took place between March 2022 and July 2022. A full explanation of our methodology can be found in Appendix 1, but in summary this included the following:

- **Initial scoping meeting:** with Arts Council England team members involved in the development and management of the Fund (March 2022).
 - **Review of Fund information:** guidance notes, website material and application information (March 2022).
 - **Development of theory of change:** workshop with key members of Arts Council England team to create a theory of change for the Fund; work to update this in light of research findings (March - July 2022).
 - **Analysis of Fund application and monitoring data:** review and analysis of data held by the Arts Council in relation to all applications to July 2022 (July 2022).
 - **Applicant survey:** incentivised online survey, distributed in April 2022 to 465 successful and unsuccessful applicants to date; we had responses from 82 individuals (an encouraging response rate of 18% given the pressure on grassroots venue and promoter time in light of the pandemic's ongoing impact on them) and developed a sampling frame in order to ensure the validity of our evaluation.
 - **Focus groups:** 3 focus groups in July 2022 with 19 successful and unsuccessful applicants (15 successful and 4 unsuccessful applicants).
 - **Interviews:** 10 semi-structured interviews with successful and unsuccessful applicants (7 successful and 3 unsuccessful applicants), plus 8 interviews with a number of key Arts Council England staff and representatives from relevant industry bodies (July 2022).
 - **Internal workshop:** workshop with key Arts Council staff, to review findings and conclusions (July 2022)
-

1.4 About this research report

Published in March 2023, this report contains the following:

- Key information about applicants to the Fund and our respondents.
- Findings and analysis from our applicant survey, in relation to the Fund's impact and their feedback on the application process, along with commentary from focus group participants and interviewees.
- Summary of sector body feedback about the Fund and Arts Council England.
- Feedback about research participants' views about how they think the Arts Council can best support grassroots music going forward.
- An exploration of what could potentially happen next, in light of the Fund's planned closure in March 2023.

Appendix includes:

- Methodology and sample frame variables and values.
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2.

About applicants to the SGLM Fund



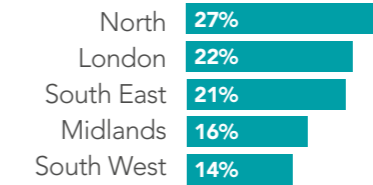
2. About applicants to the SGLM Fund

2.1 Key demographics⁷

A broad geographical spread

Looking at geographical spread, Arts Council England application data indicated that 27% of SGLM Fund applicants (126) were based in the North; 22% (104) in London; 21% (98) in the South East; 16% (73) in the Midlands, and 14% (64) in the South West.

Arts Council England area in which applicants were based



(Base: 465 applicants)

Applicants from across the full breadth of the grassroots live music sector

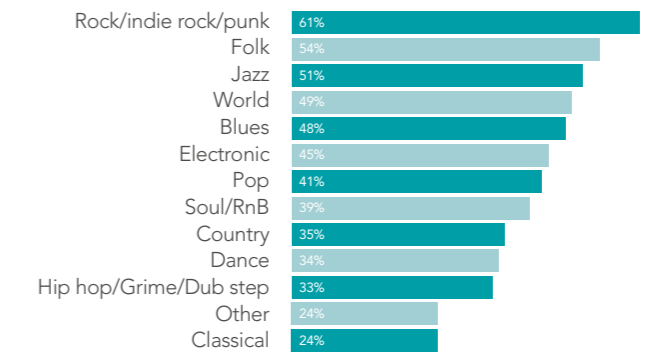
Of our survey respondents, 48% (39) worked in/for venues, 35% (28) were promoters, 10% (8) producers and 4% (3) musicians. The remaining 3 represented an arts organisation, music magazine and partnership. Within this, the contexts in which applicants worked varied hugely; from professionally run businesses programming 300+ gigs a year, to community-based promoters/venues and husband and wife teams.

Survey responses suggested applicants programmed a broad range of genres

We asked respondents to identify which genre(s) of music they promoted.

Survey responses indicated that 61% (50) of respondents promoted rock/indie/punk music, with folk/jazz/blues/electronica and world music each being promoted by around 50% (41), and pop music by slightly fewer - 41% (34).

Genres of music that respondents promoted/produced

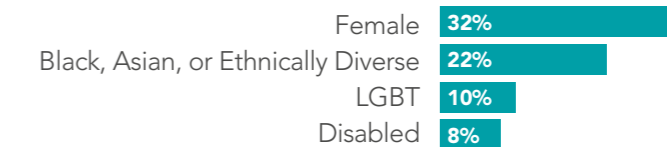


(Base: 82 respondents)

In terms of applicant diversity, the Fund's performance was similar to NLPG and DYCP funding

Looking at the proportion of applicants representing diverse-led operations, 32% (148) were female; 22% (102) Black, Asian or Ethnically diverse, 10% (47) LGBT and 8% (35) disabled. Broadly speaking, these proportions were similar to the Arts Council's NLPG and Developing Your Creative Practice (DYCP) programmes⁸. Reflecting male dominance of the music industry, the exception was that women made up 49% of NLPG/DYCP applicants, some 17% higher than for this Fund.

Proportion of respondents representing minority-led organisations or operations



(Base: 465 applicants)

⁷ Data for this section comes from and covers the 465 applicants (of a total of 491 unique applicants for whom we had valid data) from the whole applicant base where possible. Where data is not collected by Arts Council at application point we include data from our survey, covering 82 respondents. Base is given in all cases for clarity.
⁸ Source: Arts Council England Equality, Diversity and Inclusion data for 2020/21

2.2 Their engagement with the Fund

Over half of applications were for less than £15K; a similar proportion had a focus on capital development, programme development and/or testing new ways to support emerging artists

Arts Council England data shows that 52% (333) of applications were for up to £15K, 24% (154) for £15-30K, and a further 24% (154) for £30-40K.

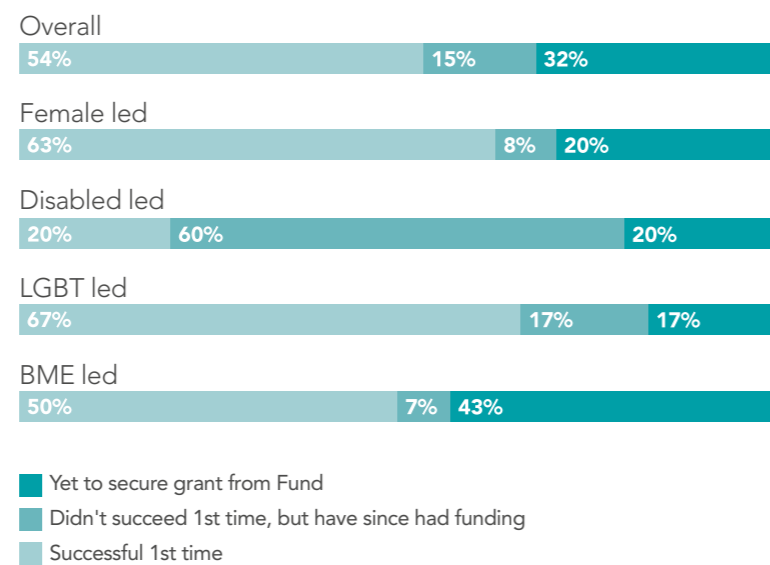
Looking at the scope of applications, over half of respondents (56%/46) included some form of capital development in their bid, with 41% (37) using the Fund to invest in new sound or lighting equipment. Looking at other forms of development, two others – diversifying programmes in order to develop new audiences and testing new ways to support emerging artists – also featured in over half of respondent applications.

Arts Council England data indicates a 40% success rate

Of the 640 applications made by the time we conducted our survey, 40% (256) had been successful, 24% (154) unsuccessful and 36% (230) ineligible. Survey findings suggested consistent success rates across all Arts Council regions, with the exception of the South West where they appeared marginally higher.

Turning to the issue of diversity, survey findings suggested that in general terms the success rate of female, disabled or LGBT applicants was higher than average. However, Black, Asian and Ethnically diverse respondents were marginally less likely to have ever made a successful application⁹. The survey also suggested disabled respondents were significantly less likely to have succeeded with their first application; just 20% did so, compared to 54% of our survey population.

Success rates amongst respondents with diverse leadership teams



(Base: 82 respondents)

2.3 Applicants' prior engagement with the Arts Council

Just over half of applicants had applied to Arts Council England before

Arts Council data indicated that 51% of applicants (237) had applied to the funder before. Confirming what the Arts Council's internal data indicates, analysis and focus group/interview feedback suggested that many of these applications were made in the last 3-4 years, and that for many Cultural Recovery and Emergency Response Funds were their first engagement with the Arts Council.

Survey findings also suggested the most common reasons for applicants having not previously applied were that they didn't know they were eligible to do so, hadn't needed to do so and/or that they'd lacked the confidence.

Survey suggested widespread prior awareness of the Arts Council, but a lack of clarity about its role

Survey feedback suggested that there was widespread awareness of the Arts Council amongst applicants, but a lack of clarity about its exact function.

"If I hadn't seen the Grass Roots fund and only the normal lottery fund I would have assumed it wasn't for me. Pushing this specific fund has really drawn attention to people like me."

Independent promoter, based in South West

Amongst respondents, 34% (28) said that prior to applying to the Fund they had a "really good knowledge of what the Arts Council does"; 33% (27) "knew about them but didn't think they supported grassroots music" and 9% (7) had been "convinced the Arts Council didn't support grassroots music". 5% (4) had never heard of them at all. Feedback also suggests the Fund itself raised awareness; no one who applied in Years 2 or 3 of it had never heard of the Arts Council prior to applying. There was also evidence that those who knew most about the Arts Council were most likely to have secured a grant through the Fund.

2.4 The challenges they were facing

Economic and pandemic-related issues dominated feedback about challenges respondents faced

"Today our soft drinks supplier said prices are going up 10% - every week brings a new price increase and it's a worry."

Venue rep, based in South West

We asked respondents to tell us about all of the challenges they faced, to identify their 3 major challenges and single out their ONE biggest challenge. Two widespread areas of challenge – the first economic, and the second pandemic-related – dominated respondent feedback.

A sizeable majority were wrestling with the economic challenges they and their audiences were facing; overall, 82% (67) were battling with a cost of living-related downturn in attendance numbers and/or turnover, with 62% (51) placing this in their top 3 and 32% (26) singling it out as the most significant challenge they face.

Meanwhile, 74% (61) were contending with unpredictable audience numbers in light of the pandemic, which appeared in 51% (42) of respondents' top 3 challenges and was singled out as their biggest challenge by 22% (18). For 61% (50) these challenges were being compounded by rising energy prices.

"Longer term, audiences will have less disposable income. The signs are there now. Smaller, grassroots events in particular will suffer."

Independent promoter, based in North West

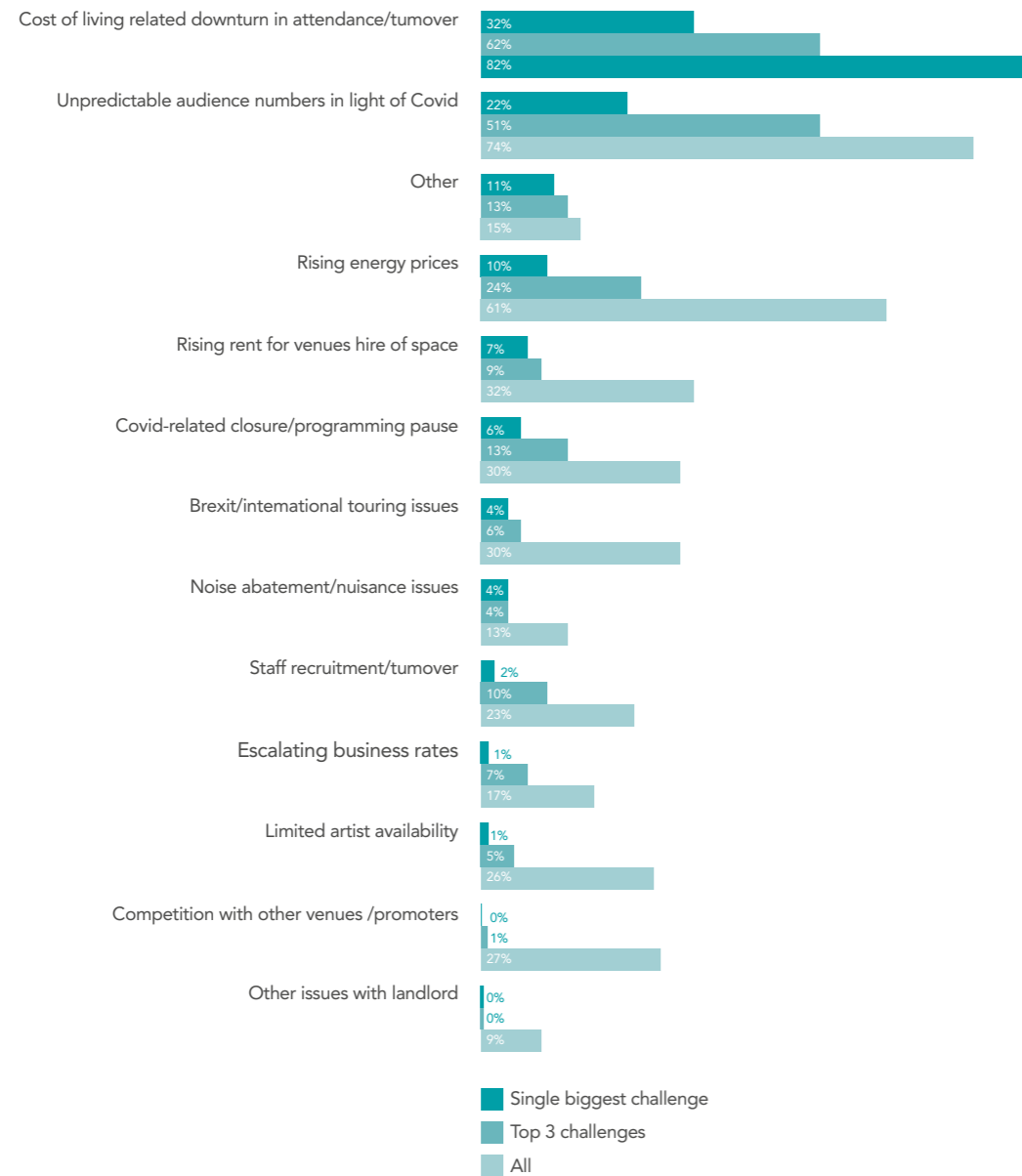
93% (76) of respondents identified at least one of these three issues as a challenge they were facing, an indication of how prevalent concern over the economy and ongoing impact of the pandemic were.

The broader picture

Beyond this, the pandemic and general economic picture were also behind some other challenges identified by respondents, such as rising rents and Covid-related programming issues. Interview feedback suggested venues having to close during the pandemic was also behind the relatively few people identifying issues such as noise abatement/nuisance threats, previously a mainstay of discussions at key sector events such as Music Venue Trust's annual Venues Day event.

Brexit, the issue that dominated pre-pandemic industry agendas, featured relatively little in comparison; 30% (25) mentioned Brexit/international touring-related issues as a challenge, most likely a reflection of the fact that Covid halted international touring and that the impact of Brexit was still to be fully played out.

The main challenges respondents were facing

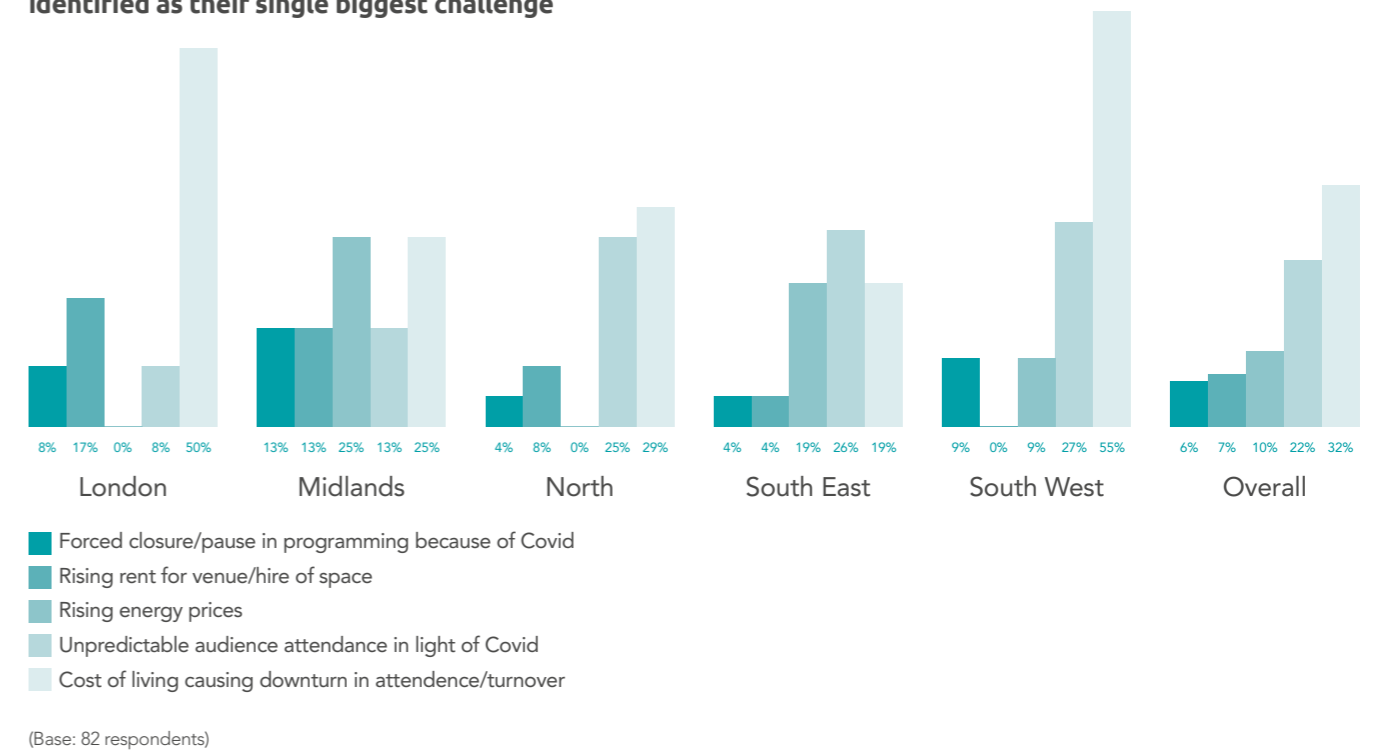


(Base: 82 respondents)

A varied regional picture in terms of challenges

Despite the fact that in all Arts Council areas bar the South East, respondents were most likely to have singled out the cost of living as their single biggest challenge, looking at how geography impacts illustrated some stark differences.

What respondents in different Arts Council areas identified as their single biggest challenge



Respondents based in London (and the South West) were almost twice as likely as respondents overall to have singled out the impact of the cost of living crisis. The 50% (6) who did so outnumbered by almost 3 the 17% (2) who singled out rising rent or venue hire. Interestingly, London-based respondents were least likely to have singled out the impact Covid was having on audience numbers.

Those in the Midlands were more than twice as likely as respondents overall to have identified rising energy prices as their single biggest challenge; along with the cost of living crisis, this dominated their feedback.

Amongst respondents based in the North, the proportions singling out the cost of living crisis and the impact the pandemic continues to have was roughly similar (29%/7 and 25%/6 respectively). As in London, not one respondent here singled out rising energy prices as their primary challenge.

The South East was the one area in which the cost of living didn't dominate feedback about respondents' single biggest challenge. Here, the picture was more nuanced, with the proportion singling out the impact of the cost of living, pandemic and rising energy prices broadly similar.

In the South West, the impact the cost of living was having dominated feedback about respondents' biggest challenge, with twice as many (55%/6) singling this out as the 27% (3) who identified the impact Covid was having. Respondents in this area were the only ones not to identify rising rents as their major challenge.

KOMEDIA BATH



Laurie Reese, the Deputy Venue Manager of Komedia Bath, tells us how applying for SGLM for PA and lighting equipment supported the development of new audiences and artists, cemented their position in the local music scene, and increased revenue.

Tell us about Komedia and what you applied to the SGLM fund for.

Komedia is a community owned venue in Bath and hosts over 400 events a year covering comedy, music, cabaret events, club nights and just about everything in between!

Whilst the venue already had a large, well-equipped 780 capacity auditorium we wanted to develop a second 100 capacity space and applied to SGLM for funds towards the installation of PA and lighting equipment. Previously we only had a vocal PA and minimal stage lighting and using the space for live music shows was too costly due to the cost of hiring additional equipment.

Some grassroots music promoters might struggle to understand how buying a PA links to Arts Council England's strategic outcomes. How did your project link to the Arts Council's Creative Communities outcome?

The SGLM investment created a professionally equipped second space which has allowed us to work with a more diverse range of artists that we wouldn't have been able to accommodate in our main auditorium. It's allowed us to support and play a role in the grassroots music scene in and around Bath, developing relationships with local artists and promoters.

In turn, programming a broader range of genres and artists whilst mirroring the first class experience we offer in the main room has enabled us to attract new and diverse audiences and extended our reach into the community.

With the programming of the main space operating on about a 6 month lead time, having a second smaller space has allowed us to expand our venue's programme, with these smaller shows typically only requiring a 2-3 month lead time. So we can now plug gaps in our diary, expanding the venue's ability to run a full and diverse offer and increasing employment for event managers, bar and box office staff, technicians and security teams.

Were there any unexpected outcomes? Things you didn't plan for that have come from the Arts Council Investment?

We worked with students from the Commercial Music Course run by Bath Spa University. By offering reduced hire rates and flexible terms we managed to secure further funding from Bath Spa to programme a series of Multistage Free Music Festivals for the community including local, national and student artists.

Do you have a tip for any grassroots promoters or venues thinking of applying?

Go for it! No doubt your mind has wandered whilst pulling a pint or drawing up settlements for a show and you've had an idea and thought "if only I had the money to try that out". The money is there to help you achieve something positive within your business and community. The guidance from Arts Council England was thorough, with a really good response from advisers on the application process.

3.

The Fund's impact on respondents' activity and models



3. The Fund's impact on respondents' activity and models

3.1 Significant and widespread impact

Two thirds said the Fund had been a lifeline for grassroots venues and promoters

"The Arts Council probably saved our business over the last few years."

Independent music promoter, based in South East

Underlining the importance of the Fund, particularly in light of the pandemic, 66% (54) of respondents said the Fund had "been a lifeline for grassroots music promoters and/or venues". Amongst those who'd had an award this rose to 94%, while amongst those who received more than £30K it was also higher, at 83%.

Getting into the detail

Perhaps a reflection of how especially tough making a living from grassroots live music is in London and the South West, respondents in these two areas were also more likely to have said it had "been a lifeline" for them and their peers, at 82% (9) and 75% (9) respectively.

Widespread impact in terms of unlocking change for respondents, beyond what was hoped

As previously mentioned, Arts Council England identified the following as some of the outcomes they hoped the Fund would achieve for grassroots music venues and promoters in the short term:

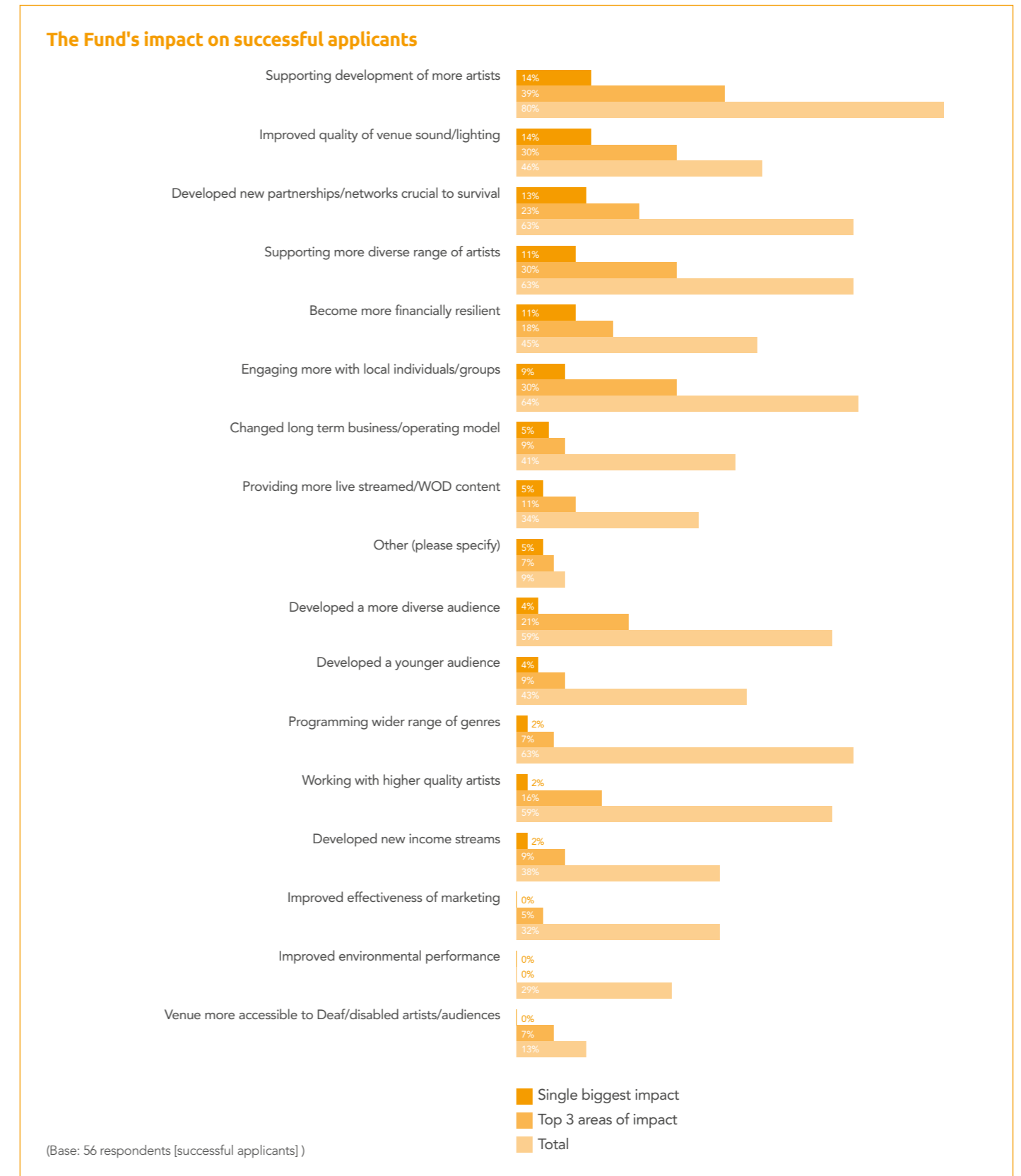
- Test new ways of increasing opportunities for young, emerging or more diverse artists
- Diversify their activity and programmes
- Test new ways of developing audiences
- Improve their infrastructure
- Make improvements to their buildings or policies
- Test new ideas relating to their business models

As we'll explore in our commentary, respondent feedback about the Fund's impact suggested that it had not only unlocked many of these outcomes but had also had a wider impact around financial resilience and place-making. It also hinted at how inter-dependent many of these impacts were.

Key outcomes – an overview

- 80% (45) had supported more artists, 63% (35) had supported a more diverse range of artists and 59% (33) worked with higher quality artists.
- 63% (35) were programming a wider range of genres; 34% (19) had produced more streamed/WOD content.
- 59% (33) had developed a more diverse audience, and 43% (24) a younger audience.
- 64% (36) had engaged more with local individuals and/or groups; 63% (35) developed new relationships/networks crucial to their survival.
- 46% (26) had improved their sound/lighting equipment, 29% (16) their environmental performance, and 13% (7) made their venue more accessible.
- 38% (21) had developed new income streams; 45% (25) described themselves as more financially resilient and 41% (23) had changed their long-term models.

The following diagram illustrates what respondents told us about the ways in which the Fund had had an impact, as well as what they identified as their top 3 areas of impact and the single biggest difference it had made for them.

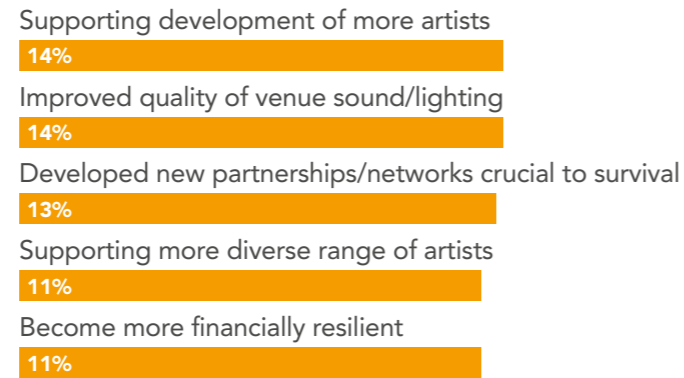


Feedback about its single biggest impact suggested the Fund had been a force for positive disruption and catalysed a focus on 'business not as usual'

Feedback about the single biggest impact the Fund had had on respondents highlighted 5 key areas of impact – the 'big 5' – each singled out by at least 10% and collectively by close to two thirds (63%/35) of respondents.

The breadth of these impacts – ranging from an increased focus on artist development to becoming more financially resilient – hinted at the way in which respondents had used the Fund to pivot their activity during the pandemic in particular, and the way in which it more generally catalysed a focus on 'business not as usual'.

The 'Big 5' Areas of impact most commonly singled out as most important



(Base: 56 respondents [successful applicants])

It also indicated just how successful the Fund had been in terms of unlocking impacts relevant to the Outcomes and Investment Principles that appear in the Arts Council's **Let's Create** strategy.

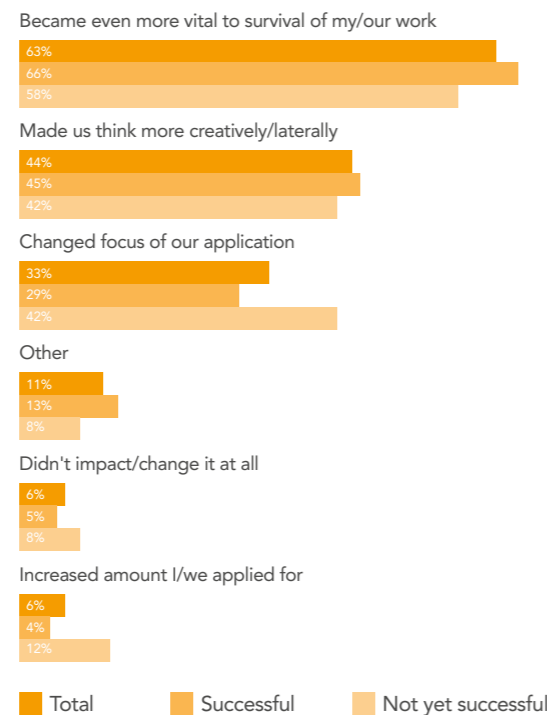
Whilst not surprising in itself – the Fund is part of the NLPG programme after all – we mention it because, as we go on to detail later, many applicants we spoke with told us how difficult they'd found it to articulate their relevance to Let's Create in their SGLM Fund applications.

The pandemic made the support all the more vital and encouraged lateral thinking

Given the backdrop of the pandemic for two out of the first three years of the Fund's existence, it's perhaps not surprising that when asked how the pandemic had impacted their applications to it, the most common response, given by 63% of respondents (52) was that the Fund's support "became even more vital to the survival of my/our work".

Reflecting our observations about how the onset of the pandemic appeared to trigger a diversification in terms of the kinds of activity respondents applied for, nearly half – 44% (36) – indicated that the pandemic did indeed "make us think more creatively/laterally" and 33% (27) that it "changed the focus of my/our application".

Respondent feedback about how pandemic impacted their applications



(Base: 82 respondents; 56 successful applicants and 26 yet to receive an award)

3.2 A real boost for artist and programme development

The grassroots music ecology is complex, with changes in one area often causing keenly felt ripple effects across the entire ecosystem. Broadly recognised as the industry's 'R & D department' grassroots venues/promoters are essential to the development of a healthy music ecology, and to artist development in particular. As such, the impact respondents indicated the Fund had had on their ability to support artists – whether that's more artists, a more diverse range, or higher quality artists – is crucial.

Impact the Fund had on recipients' support of artists



(Base: 56 respondents [successful applicants])

The Fund helped 80% to support more artists; 14% said this was its single biggest impact

With 80% of respondents (45) having "supported the development of more artists", this was the Fund's most commonly reported area of impact. It's also the impact that was most important to the largest proportion of respondents; 39% (22) listed it in their top 3 impacts, and 14% (8) identified it as the single biggest impact the Fund had had for them.

From focus groups and interviews, it's clear this support took many forms, from additional programming, to recording support, mentoring, networking and other forms of professional development.

Getting into the detail

Looking at geographical differences worth highlighting, fewer respondents from the South West (67%/6) listed this as an impact. Taken in conjunction with other feedback from these respondents, this suggested a focus instead on diversifying the artists they work with, and on capital development. Meanwhile, South East-based respondents were nearly twice as likely (24%/4) as respondents overall to have identified this as the Fund's single biggest impact, in sharp contrast to those in the North, who were half as likely to have done so (7%/1).

Amongst Black, Asian and Ethnically Diverse respondents, and those from LGBT or disabled-led organisations, feedback was unequivocal; 100% of all such respondents had increased the number of artists they work with.

Around two thirds had diversified the artists they work with and/or their programmes

"Different types of people are engaging with the venue now as we can programme things for smaller audiences. We can see change in the demographic of audiences."

Venue rep, based in South West

Diversifying their programme can be risky for venues and promoters hugely reliant of ticket sales. Respondent feedback indicates that the Fund has done much to mitigate this risk, with 63% (35) having supported a more diverse range of artists, and the same proportion programming a broader range of genres. What's more, 11% (6) identified the former as the single biggest impact the Fund has had, making it one of the 'big five' areas of impact.

"A lot of the shows we can do having this new PA are plugging gaps – generating smaller amounts of income but providing employment for front of house or backroom staff whilst continuing to make money on the bar."

Venue rep, based in South West

As a consequence of doing just this, a significant proportion of recipients had developed new audiences; 59% (33) had developed a more diverse audience and 43% (24) a younger audience. Feedback suggests that, for most, this had been about changes to their programmes and community offer, rather than their marketing.

Focus group and interviews clearly pointed to some of this diversification only being possible because respondents had used the Fund to upgrade their PA and/or other elements of their physical infrastructure; a very real example of the knock on effect that investment in capital infrastructure can have in terms of programme and audience development.

For others, the diversification in their programme was based on the development of new partnerships, for instance music charities partnering with venues to create new children's offers, or venues exploring partnerships with schools or care homes to bring music to pupils and residents digitally.

Getting into the detail

London and Midlands-based respondents were less likely to have supported a more diverse range of artists (44%/4 and 50%/3 respectively), and those in the North less likely to have diversified their programme (just 47%/7); a reflection perhaps of the existing diversity of their programmes?

Black, Asian and Ethnically Diverse respondents and those from disabled-led organisations were more likely to have diversified the pool of artists with whom they worked (88%/7; 100%/4 respectively). The latter, along with LGBT respondents, were also more than twice as likely to have singled this out as the Fund's biggest impact.

Looking at trends over time, respondents who'd received support in 2020/21 were much more likely to have diversified the artists they worked with (83%) than those applying during 2019/20 (47%). Similarly, the proportion who'd diversified their programme also peaked in 2020/21. Together, this is evidence perhaps of a shift in focus as business as usual became no longer possible during successive lockdowns?

3.3 Widespread impact as well in terms of audience development

6 out of 10 had diversified their audiences, and 4 out of 10 developed younger audiences

"Being able to engage with local communities and receive feedback and develop a broader understanding of what works locally without having to rely on larger gigs gathering 600+... has had a really positive effect."

Venue rep, based in South West

Developing audiences – whether that's about attracting and retaining new audience members or shifting the behaviour of existing attenders – often requires a multi-faceted approach that involves shifts in programming and wider product offers as well as in marketing and comms.

As a consequence of doing just this, a significant proportion of recipients had developed new audiences; 59% (33) had developed a more diverse audience and 43% (24) a younger audience. Feedback suggests that, for most, this had been about changes to their programmes and community offer, rather than their marketing.

Getting into the detail

The proportion who'd diversified their audiences is higher in both 2020/21 and 2021/22 than in 2019/20, evidence perhaps of a bigger focus on audience development as venues and audiences alike anticipated emerging from lockdown. The trend for improvements to their marketing followed the same trajectory.

Looking at geographical differences, respondents in the North were least likely to have diversified their audiences (just 40%/6), in contrast to the South East, where 71% (12) did so. Meanwhile, those in the Midlands or South West were least likely to have improved their marketing; just 17% (1) of the former and 11% (1) of the latter.

Black, Asian and Ethnically Diverse and disabled respondents were more likely to have diversified their audiences (100%/8; 75%/3 respectively), the latter also more likely to have improved their marketing.

3.4 A big focus on improving their physical infrastructure

Close to half said that the Fund had enabled them to improve their sound and/or lighting equipment – an investment for years to come, and one that catalyses much wider impact

"Without the investment in equipment we could have fallen behind other venues – we're now able to support more local artists, teaching them to promote their own shows, train sound engineers. It's created a good talent development pipeline."

Venue rep, based in South West

Nearly half of respondents who'd received SGLM Fund support (46%/26) said it had enabled them to improve their sound and/or lighting equipment. At the same time, 14% (8) identified this as the Fund's single most important impact for them; a proportion only matched by those who singled out being able to support more artists. Such feedback is testament to how important this kind of upgrade is to grassroots music venues.

"The Fund has enabled us to buy and install new equipment and support more grassroots music....Alongside being able to reach more grassroots artists, we've been able to offer more really low hire deals. It's opened up our ability to promote, diversified our programme a lot."

Venue rep, based in South West

Again, focus group discussions highlighted how improving this kind of basic infrastructure often unlocks wider impact, particularly around being able to diversify, and increase the number of, artists they work with. This in turn often leads to larger and/or more diverse audiences, and in lots of cases, increased turnover. Others pointed to it enabling them to train young technicians and engineers. In short, investing in this kind of equipment can catalyse significant lasting legacy around talent and audience development, creating quality places in which people want to live, and can work, play, and learn.

Getting into the detail

Looking at geographical differences, Midlands and South West-based recipients were twice as likely to have invested in sound/lighting kit as London-based respondents and 3 times as likely as those in the North. Those in the South West were also much more likely to have singled this out as the Fund's biggest impact; nearly half (44%/4) did so, compared to no one in London or the North, and around 1 in 6 in the Midlands (3)/South East (1).

Perhaps surprisingly, the proportion of venue-based respondents who invested in new kit (51%/18) was only slightly higher than the proportion of individual promoters (38%/8).

Just over a quarter have improved their environmental performance

In comparison, the proportion of respondents who had used the Fund to improve the environmental performance of their venues is smaller; some 29% (16). Again, the impact of the pandemic is clear though, with this proportion rising to 50% in 2020/21 whilst many venues were closed and more able to carry out these works, before dropping off again in 2021/22.

Around one in six have made their venue more accessible

"It's improved the experience of artists and audiences and made a massive difference in terms of accessibility and diversity of audiences. We're now more inclusive and have an Attitude is Everything Gold Award."

Venue rep, based in South West

Just under one in six – 13% (7) – of respondents who'd had SGLM Fund support had made their venues more accessible to D/deaf and/or disabled artists or audiences. Again, this is a tangible example of how investment in physical infrastructure can result in much wider impacts that align well with the Arts Council's Outcomes and Investment Principles.

One interviewee described how the Fund unlocked change that had seen them become the first grassroots music venue in the country to secure an Attitude is Everything Gold Award, a widely-coveted Industry award, given only to those that show a significant and ongoing commitment to improving accessibility.

3.5 Evidence of some impact on financial resilience or new business models

Some success in enabling respondents to test new ideas for their business model and build their financial resilience

Survey feedback suggested that for around half of recipients the Fund had not only had the hoped-for impact in terms of enabling them to test new ideas for their business models, but that – despite the pandemic – it also enabled them to improve their financial resilience and develop new relationships they considered crucial to their survival. The chart on the right illustrates the proportion of respondents for whom this was the case.

How Fund had impacted finances and/or business/operating models

Developed new partnerships/networks crucial to survival

63%

Become more financially resilient

45%

Changed long term business/operating model

41%

Developed new income streams

38%

(Base: 56 respondents [successful applicants])

For two thirds, the Fund had enabled them to develop crucial relationships and/or partnerships

Survey feedback suggested that recipients saw the Fund as an opportunity to reset and rethink, and expand their horizons and networks. Nearly two thirds of respondents (63%/35) who'd had Fund support said it had "helped them develop new relationships/partnerships crucial to their survival". At the same time, 13% (7) said that this was the single biggest impact the Fund had had for them, placing it third in our 'Big 5' list of major impacts, just behind "supporting the development of more artists" and "improving sound/lighting equipment". In an industry where relationships are real 'currency', it's great that the Fund had had this impact for so many, and is another example of how it appears it will have real and lasting legacy for recipients.

"The recognition that having Arts Council funding has shifted us from being some random underground people to someone they can trust."

Independent promoter, based in South East

Here, it seems this impact is not just about money, but also about the validation that an Arts Council grant provided, increasing both recipient self confidence plus the confidence that others have in them. These comments from independent promoters typify wider feedback we heard in interviews and focus groups.

"It felt like such a huge achievement when the offer letter came in...more rewarding than a job offer!"

Independent promoter, based in the South West

Getting into the detail

Feedback points to the pandemic causing respondents to pivot their activity. Amongst 2020/21 recipients, the proportion who developed new partnerships as Covid triggered lockdowns rose from 60% (9) to 83% (10).

Midlands and South West-based respondents were less likely to have done this (50%/3; 44%/4) with none singling this out as the Fund's biggest impact. In contrast, amongst London and Midlands-based respondents it was the most commonly mentioned number 1 impact, singled out by 22%/2 and 27%/4 respectively.

Turning to diversity, 100% of Black, Asian and Ethnically Diverse respondents (8) said they had developed new relationships/partnerships. The same was true for LGBT (5) and disabled respondents (4).

Over a third had provided more live streamed/watch on demand content; for some this was less about Covid and more about wanting to make their work more accessible

With Covid-related lockdowns/restrictions seeing business as usual go out of the window for venues and artists alike, many turned to live streaming or watch on demand gigs. In response, audiences in their droves turned to these for connection and inspiration during a period of unprecedented fear and uncertainty.

This trend was reflected in respondent feedback, which showed that over a third (34%/19) of those in receipt of SGLM support used it to provide more live streamed and/or watch on demand. Anecdotally, the focus was wide-ranging, from a series of folk events with a focus on black and minority ethnic musicians to a pilot iteration of what has developed into the Streamland platform for streaming grassroots music.

For others, the Fund had been a positive means of using digital technology to make their programme more accessible to vulnerable or disabled people. One venue was continuing to make the first hour of all gigs available on line for free/small donations to enable older and more vulnerable local people to engage with their events from home, while another was building on their pandemic-related live streaming experience to pilot a digital programme with care homes and schools.

Getting into the detail

The pandemic's impact was clear here; the proportion providing more live streamed/watch on demand content increased over the Fund's existence, from 13% who received an award in 2019/20 (2) to 48% (11) in 2021/22.

Those in the South West were more likely to have increased their digital output, with 56%/5 having done so.

Nearly half were more financially resilient; a similar proportion developed new income streams

Nearly half of all respondents – 45% (25) – who'd received a SGLM Fund grant said they had become more financially resilient as a result. A similar proportion – 38% (21) – had developed new income streams off the back of activity they undertook as a result of their funding. Set against the backdrop of a pandemic, this feedback was particularly noteworthy.

As well as those already mentioned, there were other ways the Fund had done this, as witnessed by focus group and interview feedback. One independent promoter bought equipment that meant they can create merchandise for themselves and local bands. Another, who secured funding to produce live streamed gigs, had subsequently built a company that creates multi-artform immersive experiences. Meanwhile, one music charity had developed an ongoing partnership with a local grassroots music venue, via which they've built a new risk-free income stream.

Getting into the detail around financial resilience

As the impact of the pandemic and cost of living crisis rose, there was a downward trend in terms of increased financial resilience; 60% (9) of 2019/20 recipients saw this, compared to 42%/5 in 20/21 and 39%/9 in 21/22.

Perhaps unsurprisingly, those in receipt of the highest possible grant – between £30-40K – were more likely to have become more financially resilient, with 67% (10) saying this was the case.

London-based respondents were much more likely than their peers nationally to be more financially resilient as a result of the Fund, with 67% (6) saying this was the case. Those in the North were most likely to have singled this out as the Fund's major impact, with 27% (4) doing so. Both of these were in sharp contrast to the Midlands – the lowest scoring area – where just 17%/1 were more financially resilient and no one identified it as a major impact.

Disabled and LGBT respondents were more likely to have become more financially resilient as a result of the Fund, with 75% (3) and 60% (3) respectively saying this was the case. Disabled respondents were also twice as likely as average to have singled this out as the biggest impact the Fund had had for them, with 25% (1) doing so.

Exploring the detail around new income streams

There appeared to be a correlation between size of grant and the likelihood of respondents developing new income streams; 17%/1 of £15-30K recipients had done so, but amongst £30-40K recipients this rose to 53%/8.

Respondents based in London or the North were about half as likely to have developed new income streams as average (22%/2 and 20%/3 respectively); that's in sharp contrast to the South East, where 59%/10 had done so.

Perhaps reflecting the added value that having a building brings to this issue, individual promoters were much less likely to have done this than their venue-based peers (29%/6 vs 43%/15).

Black, Asian and Ethnically Diverse recipients appear more likely to have done this (63%/5).

So too had those who got support with applications from the Arts Council/Music Venue Trust (75%/3 and 67%/2 respectively).

For the majority, applying to the Fund had had a positive impact on their broader fundraising ability

"People always say the hardest funding to get is the first grant, and Arts Council was the first one we got. The majority since have been successful. It gave us confidence and know how. Also the visibility that we had Arts Council support perhaps made it more attractive to other funders."

Venue rep, based in South West

As we go on to detail in section 5, Arts Council England hoped that the Fund would result in grassroots music venues and promoters being able to submit competitive NLPG applications in the future. However, an unanticipated outcome of the Fund worth noting here is that it appears to have increased the broader fundraising ability and confidence of over 7 out of 10 survey respondents. Just 21% (17) said applying to the Fund "hadn't had a positive impact on their wider fundraising", with 48% (39) saying "it's developed my confidence about my/our broader fundraising skills and understanding", and 24% (20) that they "have already used these skills in other bids".

More than 4 out of 10 had changed their long-term business or operating model

"By next year, we'll potentially have a totally different business model."

Independent promoter, based in South East

More than 4 out of 10 respondents – 41% (23) – said they'd changed their long-term business/operating model off the back of SGLM support, suggesting that for many it had been much more than just a lifeline during a particularly difficult time.

Examples of this we came across in our focus groups were many and various. They included an electronic music magazine that used its award to evolve its business model, soundproofing its premises and developing monthly live sessions that not only generated ticket sales but were also the basis of new subscriber-only content. Another independent promoter had moved into creating band merchandise, while the model of a venue in the North had evolved to include digital club nights.

Getting into the detail

Those who had received a grant in 2019/20 were less likely to have changed their long-term business/operating model as a result (just 27%/4 did so), suggesting that the story in the Fund's first year was much more about helping people to do 'business as usual' better.

As was the case in terms of financial resilience, Midlands-based respondents were less likely to have changed their models; just 17% (1) had done so, again making them 4 times less likely to have done so than their London peers.

Interestingly, despite being more likely than average to have become more financially resilient, disabled and LGBT respondents were less likely to have changed their business/operating models, with just 25% (1) and 20% (1) respectively having done so.

Meanwhile, individual promoters were nearly twice as likely as venue-based peers to have changed their models - 57%/12 vs 31%/11 - perhaps reflecting just how precarious it is being an indie without a permanent home?

And again, those who'd received support with their application from the Arts Council and/or MVT were more likely to have seen this impact, at 75% (3) and 67% (2) respectively.

3.6 Enhancing their contribution to place making

Two thirds had increased their engagement with local individuals/groups, and there's evidence many had further expanded their placemaking activity

"Being able to engage with local communities and receive feedback and develop a broader understanding of what works locally has had a really positive effect and will increase our ability to put on more diverse gigs."

Venue rep, based in South West

One argument made widely in recent years is that grassroots music venues are community assets, in the same way that theatres and arts centres have been viewed for decades. The argument is sound; venues have for years provided: opportunities for emerging artists to cut their teeth and hone their craft; rehearsal space and contacts for local artists, and opportunities for local audiences (including those under 18) to experience a wide range of live music. In addition, some are now exploring becoming Community Benefit Societies, supported by Music Venue Trust's Own Our Venues campaign. In short, many are key to the place making agenda that's at the heart of Arts Council England and local and central government policy making at present.

What was very encouraging to see was that, as a result of the Fund, a sizeable proportion of respondents had expanded further still their contribution to that agenda. Close to two thirds of respondents (64%/36) who'd had support said it had enabled them to "engage more with local individuals and/or groups", with 9% (5) saying this was the Fund's single most major impact.

Looking at the forms of development their applications focused on shed further light on what that engagement had been about. Close to half of all respondents (46%/26) "planned to expand their general participatory/community activity", and a quarter (25%/14) to "develop an entirely new strand of work with young people". Meanwhile, for 1 in 5 (11), their plans included "trailing the use of their building outside of normal (gig-related) hours".

Focus groups and interviews revealed a variety of ways in which respondents had engaged with local individuals and groups, from a venue supporting a series of festivals and development opportunities for local indie promoters, to a consortium bid between promoters working together for the first time and a new partnership between a music charity and local venues to create seasons of relaxed/family gigs.

How recipients planned to/had developed their place making activity

Have engaged more with local individuals/groups



Planned to develop wider participatory/community activity



Planned to develop new young people's stand



Planned to test new venue uses outside of regular hours



(Base: 56 respondents [successful applicants])

Getting into the detail

There's evidence here that, as the pandemic made 'business as usual' impossible, respondents broadened the scope of their activity; 47%/7 of those who'd received Fund grants in 2019/20 had engaged more with their local communities, while in 2020/21 that had almost doubled to 83%/10, before falling back to 70%/16 in 2021/22.

Looking at how the grant size appeared to have affected impact, 72% (31) of those who'd received under £15K focused on building local connections, compared to just half of those whose grants were for over £15K (10).

Respondents in the North were much less likely to have increased their community connections than peers elsewhere; just 40%/6 of the former had done so, but in the Midlands it was 83%/5 and in London 78%/7.

Meanwhile individual promoters were more likely to have done this than their venue-based peers, with 81% (17) of the former and 54% (19) of the latter having increased these local connections.

Amongst Black, Asian and Ethnically Diverse respondents, everyone fed back that they'd increased their local relationships, suggesting a widespread focus on more local community building. In contrast just 40% (2) of LGBT respondents had done so.

3.7 Few thought these impacts would have been unlocked without the Fund, but there was concern about sustaining this

9 out of 10 recipients said they wouldn't have been able to do what they've done without the Fund

"Without funding from the Arts Council I'm not sure how long music venues can survive."

Venue rep, based in South West

Echoing earlier feedback about the Fund being a lifeline, respondents who'd had support were almost unanimous in saying that it was the essential ingredient in being able to make any of this change happen.

Just 5% (3) said they "might have been able" to do what they've done without SGLM support; that's in sharp contrast to the 46% (26) who said they "definitely wouldn't have been able to" and the 43% (24) who said it was "unlikely".

How likely the activity would have been without SGLM funding

DEFINITELY WOULDN'T have been able to do it

46%

It's VERY UNLIKELY I/we'd have been able to do it

25%

It's UNLIKELY I/we'd have been able to do it

18%

I/We MIGHT have been able to do it

5%

(Base: 56 respondents [successful applicants])

A widespread sense that the longer-term impact of the Fund may be hampered by the ongoing impact of Covid, Brexit and the cost of living crisis

"In normal times I think this would have a strong longer term impact but the way things are going with the cost of living I'm facing the next year with trepidation. Audiences have less disposable income. The signs are there now. In particular, smaller, grass roots events will suffer."

Independent promoter, based in North

Amongst some interviewees and focus group participants there was a clear feeling that the cost of living crisis, the ongoing impact of Covid and, to some extent, Brexit, were likely to reduce the longer-term, more sustained impact the Fund has. Although many recipients appeared to have been able to use SGLM funding to increase the number and quality of artists they work with, and diversify their programmes, many called into question the extent to which this could be sustained in the future purely via ticket sales.

"Without some radical change in how people value live music, funding will be needed to do this viably; either putting in our own profits or fundraising. Relaxed concerts at £20? I don't think so."

Venue rep, based in South West

There was also widespread concern about the impact the cost of living crisis would have on people's ability to buy tickets or attend participatory sessions. Promoters, venue reps and industry body reps alike fed back that, as the industry's 'R&D department', those in grassroots music should be able to access funding for 'business as usual' rather than just for new developments, despite some viewing this as a challenging prospect given current NLPG guidelines.

"Without music venues there won't be any artists. Things will really stagnate... We need to be able to pay ourselves for all the things that are invisible and dull."

Venue rep, based in South East

In short, many thought that - without continued investment - the growth or development that the Fund had unlocked for them might in fact end up being short-lived, and that their very existence come under even bigger threat.

MATT & PHRED'S, MANCHESTER



Claire Turner is the general manager and part-owner of Manchester venue Matt & Phred's. She tells us how funding from SGLM to develop live streaming and a new membership platform allowed them to reach new audiences and change the perception of what a jazz club can offer.

Claire, tell us what you applied to the SGLM fund for.

We've always been interested in live streaming musicians' gigs from Matt & Phred's and during the Covid-19 lockdown, we opened our social media platforms directly to musicians so they could perform from home with a 'PayPal' link for viewers to 'Pay What They Can'.

After this success, we knew we could create an on online series of live streamed performances from Matt & Phred's, named Club+ and successfully applied for funding towards camera equipment and set up costs.

What has the development of live streaming meant for artists playing the club, your audiences and your team?

We developed a membership area of the website to host Club+ content, including live streams and catch-up content. Club+ membership is run directly through the venue, enabling an ongoing relationship with audiences who engage with the series.

We've trained and increased the capabilities of our sound engineers, including new approaches to lighting and presentation alongside sound mixing for video and live, enabling them to develop new skills for their future careers.

Introducing live streaming has been well received by artists, with positive feedback on the professionalism of the filming and quality of audio. For the club, it has led to new procedures including extending artist contracts to cover live streaming and permissions to broadcast. The bands

all receive the footage to use for their own promotional materials, which will be helpful as they grow their careers. The ability to livestream to audiences has also helped attract higher level touring and international bands, as well as being an asset to our year-round partners such as Manchester Jazz Festival who live streamed parts of their event through the Club+ platform. Live streaming is also a great access tool - we have provided free of charge links amongst the community, ensuring that we continued to make live music available to those who couldn't travel to be physically in the venue.

Club+ is helping modernise our public image and offering easy, low cost access to live jazz for people who may feel intimidated or feel that jazz is 'not for them'. On-demand enables audiences to explore more jazz styles - jazz, blues, funk, soul and more - and find a sound they like. In turn they become returning customers.

The Arts Council's Investment Principles include Ambition and Quality. How do you think Matt & Phred's is innovating and developing new ways of working?

Club+ has been successful in putting Matt & Phred's on the map as a proactive, forward thinking jazz club. We're the only jazz venue in the North West currently offering this service, so we stand out, particularly in the crowded Manchester scene and alongside more commercial music venues.

The investment has also enabled us to explore ways to use the venue during the day and for purposes other than music, including filming, broadcasting panel discussions etc. Being able to diversify our income by expanding the use of the space will offer longer term opportunities and growth to the business.

The installation of streaming equipment and the creation of the Club+ portal has been a pilot project which will provide vital intel to the wider industry at a time when the role of live streaming in a post pandemic setting is still being explored.

Were there any unexpected outcomes from the project?

We've seen already partnerships with UK and international Jazz Festivals who share Club+ content and who make their filmed content available to Club+ subscribers. These kinds of partnerships have the potential to raise the international profile of the UK jazz scene and develop new audiences.

If you had one piece of advice or top tip for other grass roots music promoters or venues looking to apply, what would it be?

Have a clear idea of what you require the funding for and how this may change from your original idea. Whilst we have been able to explore Club+ beyond our original ideas, we are still looking at ways to open the market to a wider audience. Adaptability and perseverance are key.

4.

Feedback about the application process



Photography by Amber Mylius-King

4. Feedback about the application process

4.1 Most had support; those who didn't were less likely to have made successful applications

Two thirds had support to apply, but those yet to succeed were much less likely to have done so

"(It was) very challenging. At times I almost gave up. It was all new – putting pen to paper, understanding the questions, knowing what was required. I didn't feel very confident initially, but that changed over time. By my 3rd application (my 2nd successful one), I felt much better."

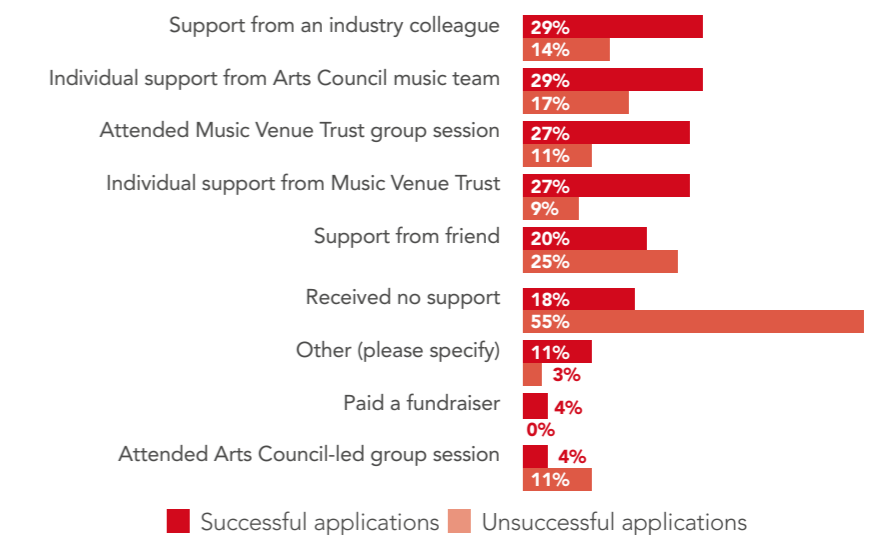
Independent promoter, based in North

Respondent feedback confirmed how valuable having external support was to applicants. Over 8 out of 10 (82%/46) of recipients who took part in our survey had had some such form of support.

In sharp contrast, this fell to just 45% (29) amongst recipients whose application(s) had been unsuccessful, meaning that unsuccessful applicants were three times more likely to have received no external support at all.

The diagram here summarises what support respondents accessed when making successful and/or unsuccessful applications to the Fund¹⁰.

Support respondents received when making their applications



(Base: 56 respondents referencing successful applications & 64 unsuccessful applications)

Getting into the detail

Arts Council England support: As well as being the only ones to have accessed Arts Council group sessions, those in the South East & South West were more likely to have had 1-1 Arts Council support (47%/8 & 44%/4). That's in contrast to just 13% (2) in the North, 22% (2) in London and none in the Midlands. Venue reps were nearly twice as likely as promoters to have had such 1-1 support; disabled respondents also more likely to have had it.

Music Venue Trust support: With 67% (4) of Midlands-based respondents having had 1-1 MVT support, they were 2-3 times more likely to have done so than on average, and Londoners least likely (just 11%/1). Black, Asian and Ethnically Diverse respondents were half as likely to have accessed any MVT support.

Industry colleague support: Those based in London were most likely to have accessed support from an industry colleague (44%/4), perhaps reflecting that much of the industry is based there. No one in the Midlands had this.

Support from a friend: Black, Asian and Ethnically Diverse respondents were three times as likely as overall to have relied on this support (63%/5), while those whose applications were ineligible were twice as likely.

No support at all: Amongst successful respondents, individual promoters were nearly twice as likely as venue-based peers to have received no support (24%/5 vs 14%/5). However, amongst unsuccessful respondents, the proportion who had received no support at all was exactly the same, at 55%.

¹⁰ The numbers here reflect the fact that some applicants have made – and provided feedback about – both successful and unsuccessful applications to the Fund.

4.2 Feedback was broadly positive, but there were concerns about the application form and follow up to unsuccessful applications

Positive feedback about the Arts Council's customer services team and music relationship managers

The diagram below summarises how positively respondents rated different aspects of the Fund application process; the higher the score, the more positive the feedback (so 1=very bad and 5=very good), with a score of 3 or above viewed as positive.

It illustrates that feedback was most positive in relation to support received from Arts Council's customer service team and music relationship managers, and least positive in connection with the application form and feedback received about an unsuccessful application.

Within these scores, there is a range of opinion that reflects the diversity of those working within grassroots music. Amongst independent promoters and venue reps we spoke with there was consistent feedback that the former found applying more difficult.

Feedback focused not just differences of understanding and skill but also the relative lack of time independent promoters have, given they are responsible for all elements of promoting their events and that many also have part-time jobs.

Most thought the guidance was OK, but nearly half rated the application form as bad

"It's public money, of course you should be challenged about using it for good and be asked about it... but Grantium is off putting."

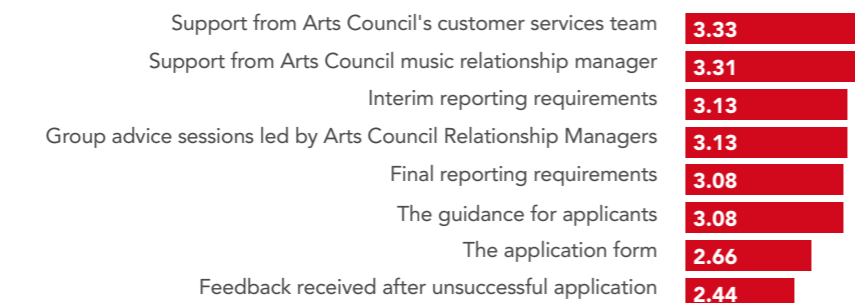
Venue rep, based in the South East

Amongst survey respondents, the SGLM Fund's application guidance notes received a score of 3.08, indicating that feedback was somewhat ambivalent.

However, feedback about the SGLM application form was less positive, resulting in a lower overall score of just 2.66.

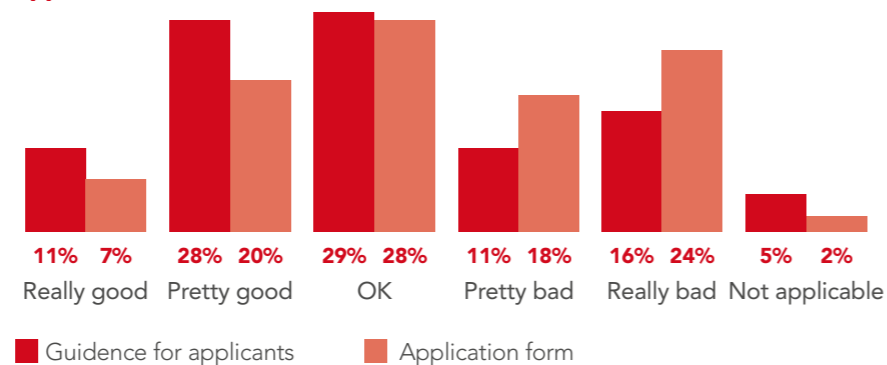
The diagram on the right illustrates in more detail our survey respondent feedback about these two different aspects of the application process.

How positively respondents rated different aspects of the application process



(Base: 82 respondents)

How respondents rated the SGLM Fund applicant guidance and application form



(Base: 82 respondents)

Looking first of all at the guidance for applicants, those giving it a positive score (39%/32) outnumbered those who don't (27%/22). When we asked applicants how the guidance could be improved, comments in the main focused on simplifying the language used by Arts Council. One focus group participant said, *"It feels very opaque what they want from you,"* while another commented, *"With the Investment Principles, I thought 'Is this a trick question?'"*

There was also a widely held view that more music-specific guidance would be helpful, especially for novice applicants. These comments echo those made by industry body reps who had supported people to make applications to the Fund, and had a good sense of what applicants had struggled with.

"We're a low profit sector, no money to pay fundraisers, they need to understand our language and do the translating at their end, need to understand how tricky our cashflow is and how it works. We don't have the time to fundraise and run our businesses and we're not fundraisers."

Venue rep, based in South East

Turning to the application form, a quarter (20) described it as "really bad" and another 18% (15) as "pretty bad". Conversely, just 27% (22) thought it was "good". Amongst focus group participants and interviewees, the new form introduced as part of an overhaul of NLPG in November 2021 received the most negative feedback. Many of those who'd used this found it unnecessarily complicated, with disabled and neuro-divergent focus group participants also commenting on how hard the form is to navigate and complete. A number commented that the changes made to the form felt at odds with the Arts Council's wider focus on inclusivity and relevance.

Many also described struggling to articulate their ambition, needs and plans in terms of Arts Council's new Outcomes and Investment Principles, with some frustrated by this new outcomes-focused approach.

"We were shocked by the feedback we got about SGLM. We thought we'd really thought about Let's Create, but were told that we needed to think about it more. It's difficult to knit together 'we need a venue' with Let's Create"

Venue rep, based in North

Feedback from applicants about their experience of using Grantium was also widely negative. *"It's like decorating your house through the letterbox"* said one independent promoter, while another talked about how challenging they'd found using it. There were also comments about how difficult they had found it to navigate the Arts Council's website, and how badly signposted information that's relevant to them was.

Getting into the detail

Unsurprisingly feedback was more positive amongst those who had made at least one successful application. 55% of unsuccessful and ineligible applicants (7 & 10 respectively) rated the form as bad, with 64% (7 in both cases) saying the same about the guidance; this compared to 36% (18) and 16% (8) respectively of successful applicants.

Feedback about the guidance improved over time, getting better in 2020/21 and 2021/22, perhaps a reflection of people getting more inside Arts Council England processes and language in light of making other applications.

Disabled respondents were nearly 6 times as likely as respondents overall to have been positive about the form (40%/2 vs 7%/6), and along with LGBT respondents were also more positive than average about the guidance.

Conversely Black, Asian and Ethnically Diverse respondents were half as likely as respondents overall to have been positive about the guidance (21%/3 vs 39%/32 overall).

Positive feedback about the customer services team and music relationship managers, but some concern about follow up to unsuccessful applications

"I phoned the Arts Council helpline, and found their advice focused and good. And it was easy to get through on the phone."

Independent promoter, based in North

Within respondent feedback, it's the Arts Council customer service team that received the most widespread positive feedback. As the chart on the following page illustrates, survey feedback suggests that 80% of respondents (66) had engaged in some way with this team, and that amongst those who did so over half (51%/34) rated this engagement as "good" or "really good", significantly higher than the 30% (16) who rated it as "pretty" or "really bad".

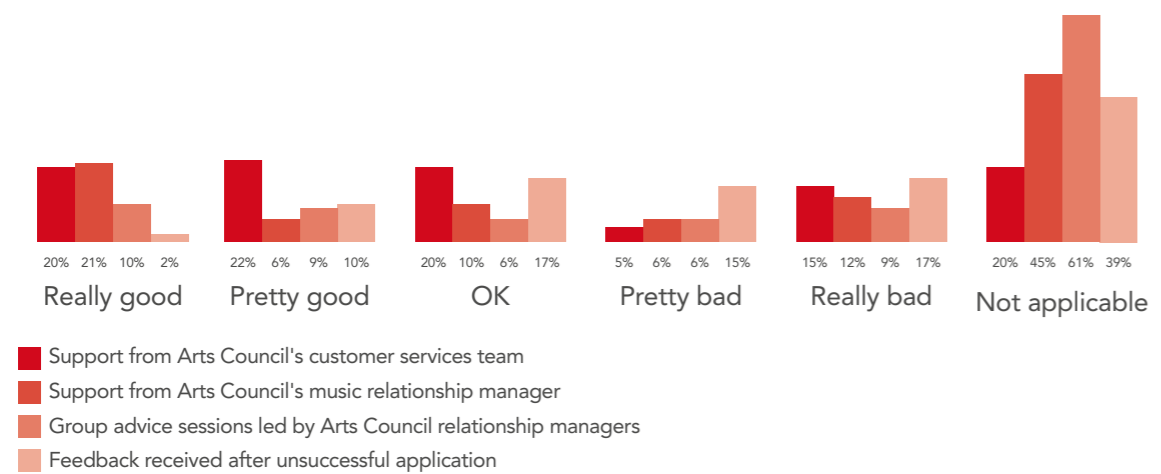
Focus group participant and interviewee feedback suggested this support was useful not just while making an application, but also once applicants had submitted an application and/or they'd been notified of their success. Evidence of the breadth of knowledge the team needs to have, the advice that individuals had sought ranged from queries about Grantium, to advice about the tax implications of receiving a grant.

Feedback about the 1-1 support respondents had received from music relationship managers was positive too, and suggested that 55% (45) accessed this. Amongst those who did, nearly half - 49% (22) - described their engagement as "really" or "pretty good", and 33% (15) as "pretty" or "really bad".

It was the feedback – or rather the lack of it – that respondents received after making an unsuccessful application that scored the lowest, with the proportion of respondents calling it "bad" (32%/26) outnumbering by 3 to 1 those who called it "good" (12%/10). Perhaps unsurprisingly, amongst those who'd made at least one unsuccessful application the proportion describing it as "bad" rocketed to 77% (10).

ELECTRONIC SOUND MAGAZINE, NORWICH

How respondents rated support they received from members of the Arts Council England team



(Base: 82 survey respondents)

Getting into the detail

Customer service team support: Unsurprisingly, those who got rejected were much less positive about this than those who'd made at least one successful application. Feedback improved across the years, evidence perhaps of the team getting more inside the Fund and more familiar with the answers to frequently asked questions?

Music Relationship Manager support: Again feedback improved over time; 48% of 2021/22 applicants (12) described this as "good", making them nearly twice as likely to have done so as their 2019/20 peers. There's also evidence that geography affected respondents' opinion. While 41% (5) of London-based respondents rated RM support as "good", in the Midlands this fell to 13% (1) and the proportion calling it "bad" was 3 times that (39%/3).

Feedback suggested that industry bodies, particularly Music Venue Trust, played a crucial role in publicising the Fund and supporting applicants

Survey feedback indicated that 29% (15) of recipients surveyed received 1-1 support from Music Venue Trust, while amongst those yet to succeed with a bid this fell to 11% (4). MVT produced 3 iterations of guidance connected to the Fund: pre-Covid, the post-Covid reopening of the Fund and when NLPG was relaunched, and had also provided other online resources for Music Venue Alliance (MVA) members.

Anecdotally, MVT sources estimated that they had reviewed around 80 MVA member applications since the Fund's launch, with each applicant getting bespoke feedback from an experienced member of the MVT fundraising team as part of their membership package. Despite one MVT rep saying they had "a really short time to skill up the sector", amongst participants and interviewees, feedback about MVT's support was unequivocally positive; this quote typifying what we heard repeatedly from venue representatives:

"Everything made sense when we came across MVT. We were mentored on how to answer the questions, with 1-1 support with Lucy and lots of support from members of her team."

Venue rep, based in North West

Anecdotal feedback also pointed to how instrumental MVT had been in terms of promoting the Fund. Every venue representative we spoke to had initially heard about the Fund via the organisation, and there was evidence too of a lot of collegiate working amongst members, with individuals sharing examples of successful applications via shared drives and email, and venues who succeeded passing on their forms to independent promoters with whom they worked.

Other industry bodies, such as the Association of Independent Promoters and Independent Venue Week, also played an important role, but with significantly more limited resources, and/or a smaller reach. In light of this difference, it's perhaps not surprising that most independent promoters with whom we spoke felt much more isolated, received less support, and were more likely to only have heard about the Fund by chance or via friends.



Mark Roland is the co-founder of Norwich-based Pam Communications Ltd, publisher of Electronic Sound magazine. He tells us how investment from SGLM has enabled the magazine to develop into a multimedia music platform connecting artists to international audiences.

Tell us what you applied to SGLM for.

We successfully applied to create a space within the Electronic Sound editorial offices where we could invite both emerging and established artists to come and play sessions. Funding has supported the running of the inaugural season of sessions, which are hosted on the new Electronic Sound website.

How has the investment had an impact your business? Has it made you more ambitious and what skills have you picked up?

It's early days, but the investment has already proved to be quite transformative. By having artists come into the space, we are strengthening our relationships with artists and their teams. It was always our intention for the project to become part of the live music infrastructure for electronic and experimental music in the UK, and we already sense that happening through the experience of recording the five sessions so far. We're working with artists in new ways, amplifying their work, and at the same time reaching new and larger audience for Electronic Sound itself. We've added high end skillsets of video and audio production to our activities, and marketing planning that goes beyond the

magazine itself. Before, Electronic Sound magazine was our sole activity, now the magazine fits into a broader, larger and more ambitious structure of activity which will reach much larger audiences.

How did the Fund develop the way you do things? What's changed?

It has helped us expand our activity from editorial coverage on the page to being a multimedia music platform. So Electronic Sound is no longer just a magazine, but an online and physical destination for music fans to experience music in a media space. We've always believed in the music press as an essential part of the energy of the UK music scene, and we're now able to maximise that by becoming a hybrid media platform which can easily reach large international audiences.

One of the Arts Council's investment principles focuses on dynamism and how organisations are able to respond to challenges and change. So let's talk about money – how are you developing new income streams as part of the project?

Diversifying income streams is a very important part of this project for us, especially as costs for producing and distributing physical products continue to spiral. The new website is a mix of free content and premium content accessed via membership paid for monthly.

If you had one piece of advice or top tip for other grass roots music promoters/venues looking to apply now, what would it be?

Distil your application into a very clear project, with parameters and outcomes that are really easy to communicate. Try to keep it as simple as possible which will allow you to create sharp focus which will be understood by other people quickly. Our project started off being quite complicated, but once we narrowed it down to 18 events each individually budgeted, with an initial outlay for allowable equipment that we needed to make them happen, it came together.

Also the application process takes a good chunk of time, and can force some reflection on you (questions that seem so obvious to you because you're so close to it, like: why are you doing this thing? Is it actually high quality? Who is it for? How are you going to reach an audience?). So factor in planning and reflection time.

5. Impact on their relationship with Arts Council England



5. Impact on their relationship with Arts Council England

5.1 Exploring shifts in applicants' understanding of, and engagement with, Arts Council England

In addition to those outlined in section 3, the Arts Council identified a number of applicant-related outcomes that focused more on venue and promoter understanding of, and engagement with, the funder itself. These were that:

- Grassroots music venues and promoters become familiarised with Arts Council criteria and processes for applying for funding (short-term outcome).
- They are able to submit competitive Project Grant applications (long-term outcome).

In this section, we explore how successfully this first outcome had been achieved, and what evidence there was that the latter will happen once the Fund closes in March 2023, as well as sharing other feedback about how the Fund had impacted applicants' relationship with the Arts Council.

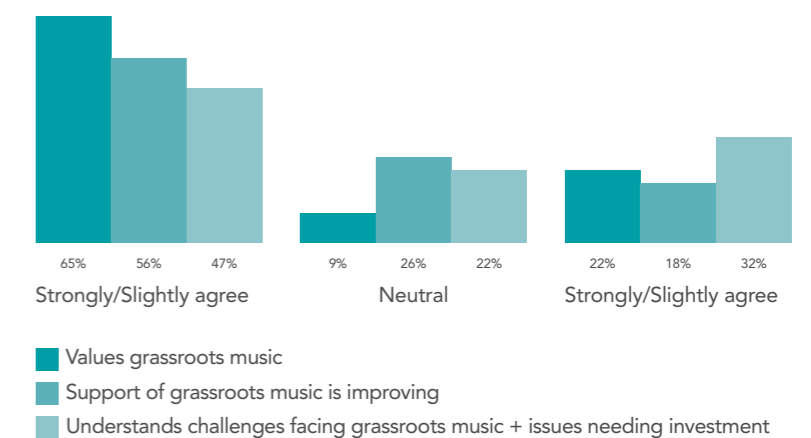
5.2 Feedback about the Arts Council's engagement with grassroots music

Support was perceived to be improving, and they felt valued, but some thought the Arts Council needs to deepen its understanding

We asked respondents for their feedback about Arts Council England's engagement with the grassroots music sector, collecting views about the extent to which it values the sector and understands the issues it faces, alongside those on whether its support of grassroots venues and promoters is improving.

The diagram here summarises headline feedback, which suggested that the majority of respondents believed the Arts Council valued what they do and that its support for them was improving, but that some felt it wasn't completely aware of the reality and the challenges the sector faces.

Respondent feedback about Arts Council England's engagement with grassroots music



(Base: 82 respondents)

7 out of 10 respondents believed that Arts Council England values grassroots music, and over half that its support of the sector was improving

Reflecting the impact the Fund has had, feedback about the Arts Council's engagement with the grassroots music sector was very positive. When asked whether they thought "Arts Council England valued grassroots music", close to 7 out of 10 survey respondents (69%/57) said that they did, with 40% (33) "strongly agreeing" that this was the case and 29% (24) "slightly agreeing". Conversely, just 1 in 5 – 22% (18) - said they didn't believe this to be so. Feedback from one interviewee that "we felt a bit excluded in the past, but we feel less like that now" typified what we heard in more widely in interviews and focus groups.

Furthermore, and equally encouraging, just over half of respondents – 56% (46) – believed that the Arts Council's support of grassroots music was improving; three times the number who disagreed (18%/15).

Getting into the detail

Unsurprisingly, those in receipt of support through the Fund were more likely to believe the Arts Council valued grassroots music and/or that its support of the sector was improving. Amongst respondents who'd made at least one successful application, 92% (47) believed the funder values grassroots music, compared to 16% (2) of those yet to succeed with an application. In line with this, London and South West-based respondents, amongst whom success rates were marginally higher, were more positive than their peers, with 83% (10) of the former and 100% (11) of the latter saying this is the case.

In terms of the proportion who thought the Arts Council's support for grassroots music was improving, as you'd expect, there was a massive spike amongst 2019/20 recipients, in response to the Arts Council launching the Fund. Amongst these respondents, it was 94% (14), compared to 58% (7) of 2020/21 recipients and 72% (18) in 2021/22.

Three quarters would recommend the Fund to others working in grassroots music

In light of the above, and with the Fund having been extended until March 2023, it was encouraging to hear that nearly three quarters of respondents (73%/60) would recommend the Fund to others in grassroots music.

However, some respondents weren't sure the Arts Council understood the challenges they faced

Turning to whether they thought the Arts Council understood the key challenges grassroots music venues and promoters faced and the issues that needed investment, feedback was less emphatic. Whilst 47% (38) said they believed this was the case, almost a third disagreed. Anecdotally, this appeared to be more about their perception of Arts Council's understanding of the everyday stresses and strains venues and promoters face - especially those operating as sole traders or as very small teams - rather than any perceived lack of awareness at the Arts Council of any bigger industry picture.

Getting into the detail

As we saw elsewhere, respondents who'd made at least once successful application to the Fund were more positive about this than those yet to succeed. There was also the same 'launch bounce', with 80% (12) of those who'd received SGLM support in 2019/20 giving positive feedback about the Arts Council's understanding, compared to 47% (34) overall across all 3 years.

Interestingly, individuals were more likely to believe this than their venue-based peers (56%/18 vs 40%/20).

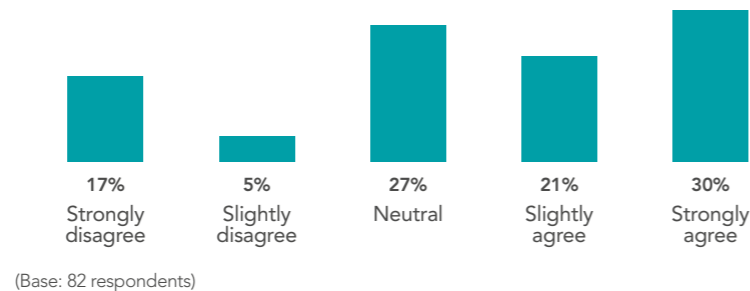
Importantly, Black, Asian and Ethnically Diverse respondents were less likely than respondents overall to believe the Arts Council is aware of the challenges they face, with just 36% (5) saying they felt this is the case.

5.3 Understanding around Arts Council funding and its criteria

Just over half had increased their awareness of other Arts Council funding

Turning to whether respondents knew which funds they were eligible to apply for, feedback is mixed. While just over half - 51% (42) - believed they had increased their awareness of other relevant Arts Council England funding, nearly a quarter - 22% (18) - didn't think that was the case, and the remaining 27% (22) weren't sure. Taken together, this suggested that there was work for the Arts Council to do in terms of raising awareness levels.

Proportion of respondents who'd increased their awareness of other relevant Arts Council funding



Getting into the detail

Those who'd made at least one successful application were 3 times more likely to have increased this awareness than those still to have an application succeed (63%/32 vs 23%/3), suggesting success breeds curiosity.

There were some notable geographical differences, with those in the Midlands or North half as likely to have increased this awareness as those in the South West (38%/3 and 42%/10 respectively vs 81%/9).

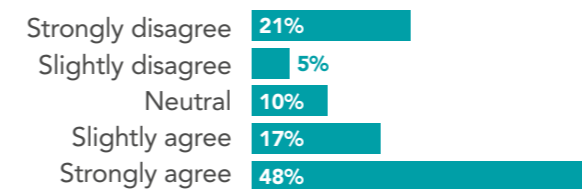
Those who'd had Music Venue Trust support were more likely to have increased this awareness; 67% (4) said this was the case.

Worryingly, LGBT, Black, Asian and Ethnically Diverse and disabled respondents were less likely to have increased their awareness, with 34% (2), 35% (5) and 20% (1) respectively having done so.

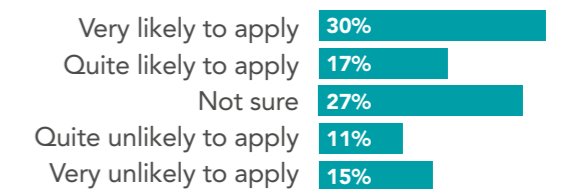
Majority said that the Fund had made them more likely to apply for other Arts Council funding

Awareness is one thing, but acting on it is another, so we asked respondents whether they were more likely to apply for other relevant Arts Council support, and more specifically a National Lottery Project Grant.

Proportion of respondents more likely to apply for other Arts Council funding



Respondent feedback about how likely they are to apply for NLPG grant



(Base: 82 respondents)

In this respect, feedback about the impact of their engagement with the Fund was broadly positive; some 65% (53) said that they were now more likely to apply for other Arts Council funding in general, and 47% (39) that they were more likely to apply for a NLPG award. However, given that one of the Arts Council's ambitions for the Fund was for it to provide a progression route to NLPG in particular, and especially in light of the financial challenges grassroots venues and promoters continue to face, it could be seen as rather worrying that over a quarter of respondents were convinced they wouldn't be applying and a similar proportion are unsure.

Getting into the detail

In terms of applicants being more likely to apply for other Arts Council funding, those who'd made at least one successful application to the Fund were much more likely to think this than those still to do so (85%/43 vs 15%/2 of those yet to do so). As we emerged from the worst of the pandemic, the proportion who thought they'll do so rose, up from 59% (7) of 2020/21 recipients to 96% (24) of those getting SGLM support in 2021/22.

And as we've seen elsewhere too, South West-based respondents were more positive, with 91% (10) saying they were now more likely to apply. Conversely, just 54% (13) of those based in the North said this was the case. And again, those who'd had MVT support were also more positive - with 83% (5) saying this was the case - evidence perhaps of increased confidence as a result of this support.

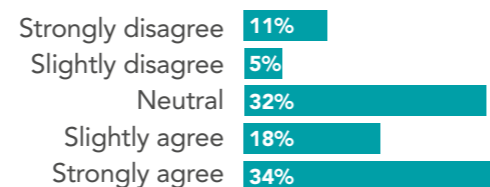
We saw a similar successful/unsuccessful trend in terms of the likelihood of them applying to NLPG, with those with at least one successful bid under their belt 3 times as likely to do so as those without (61%/31 vs 23%/3). And again, there was a spike in interest amongst 2021/22 recipients.

A mixed picture about whether they felt more confident reporting on project changes

Looking at how their engagement with the Arts Council through the Fund has impacted how confident they are about alerting the funder to any changes they'd made to their project, respondent feedback was broadly positive.

Just over half of respondents – 52% (43) – felt more confident about updating the Arts Council about such changes, three times as many as the 16% who said this wasn't the case. However, there was a swathe of respondents who weren't sure one way or the other.

Proportion of respondents who felt more confident about reporting changes to their funded project



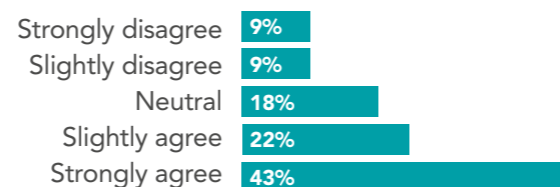
(Base: 82 respondents)

7 out of 10 thought they now had the skills to make a strong application to the Arts Council

As the chart illustrates, nearly 7 out of 10 respondents – 65% (53) - felt they now had the skills and understanding to make a strong application to the Arts Council. Conversely fewer than 1 in 5 -18% (14) – felt that they still lacked the requisite knowledge and ability to do so.

Here there was widespread anecdotal feedback – from applicants and industry bodies - that applicants' skills and understanding increased with the number of applications they made, with the Arts Council's Emergency Response and Cultural Recovery Funds proving to be a useful training ground for many who went on to apply to SGLM.

Proportion of respondents who felt they had the skills/understanding to make a strong application



(Base: 82 respondents)

Such feedback is very encouraging given that one of the Arts Council's key goals for the Fund was for grassroots music venues and promoters to become familiarised with Arts Council England criteria and application processes, and in light of a longer term ambition for applicants to the Fund to go on to submit competitive NLPG applications.

Confidence levels dropped when asked about applying for mainstream NLPG support, and there was widespread concern amongst applicants and industry bodies alike about the Fund's closure

"It being ringfenced – that's what gave us the confidence to apply. It gave us confidence by making it feel like you had a chance."

Venue rep, based in South West

Focus group participant and interviewee feedback suggested though that the confidence people had in their skills and understanding related specifically to ring-fenced SGLM funding. When asked about making an application via NLPG many felt less confident, with the comment below typifying feedback from several venue representatives and promoters.

"My concern is we are competing with organisations who have been writing funding bids for years and years. As an industry we'll be on the back foot. The element of competing with one and other at the moment is fine, but none of us are experts."

Venue rep, based in South West

How well-placed concerns such as these are is something that will become apparent in future years, as the Arts Council begins to track data about the number of NLPG applications submitted by applicants to the Fund, along with success rates.

Case Study 4:

FORUM MUSIC STUDIOS, DARLINGTON



Allison McKay is the Managing Director of The Forum, Darlington's dedicated live music venue and recording/rehearsal studios. Their SGLM-funded project supported 44 local artists and musicians to produce and stream professional quality recordings.

Allison, tell us what you applied to the Supporting Grassroots Live Music Fund for.

Our successful application was for a project we developed to support artists who had written songs during lockdown. The programme, Release From Lockdown, involved commissioning session musicians, producers and our in-house technical team to develop the music, professionally record it and to live stream a showcase event. The investment also triggered a new artwork commission which was funded by Creative Darlington with a local artist creating the artwork for the Release from Lockdown album.

Why was the Fund important? Did it enable you to do something new or ambitious?

It enabled us to work with industry professionals that we would not otherwise have been able to. Our in-house technical team researched and implemented upgrades for our recording studio which has greatly improved the quality of our recording services.

Towards the end of the project we invited all artists to perform a live streamed showcase. This gave our technical team experience and confidence in live-streaming for the future.

One of the Arts Council's strategic outcomes is Creative People, where everyone can develop and express creative activity. How did this project support artists local to Darlington?

We were able to work with 44 local freelance artists and musicians whose ability to earn an income had been halted during lockdown, as well as commissioning mentor and highly experienced studio producer/engineer Jez Larder. We live streamed performances and in total reached an audience of 8342.

Many of the artists involved in this project were looking at giving up their ambition of being in a band or creating and performing live music. This project inspired them to continue. At a time when their income from gigs had been taken away it gave them a boost and professionally recorded material to re emerge and promote themselves.

Did anything happen that you weren't expecting?

One staff member who had expressed an interest in designing and developing projects took on a natural leadership role. This has led to a new role within our organisation and she is currently working toward a qualification as Cultural and Community Project Leader.

If you had one piece of advice or top tip for other grass roots music promoters or venues looking to apply now, what would it be?

Be ambitious but keep it local and real - as grassroots venues that's what we do best.

6.

Sector body feedback



6. Sector body feedback

6.1 Recognition and praise for the Arts Council having developed the Fund

"A really vital intervention... that plugged a market need and made it clear they were taking that bit of the sector seriously."

There was widespread praise for the Arts Council for having created and delivered the Fund, with the quote above typifying the responses we got from a number of industry body representatives. Some suggested it had done much to counter the negative reputation the Arts Council had for decades previously amongst those working in grassroots music, in light of what they perceived as an almost exclusive support of Western classical music.

"Arts Council did a staggeringly good job... what they've done in terms of administering that Fund is nothing short of brilliant."

The Arts Council's music team was widely applauded for its work delivering SGLM. However, a couple commented that they felt that, whilst individual members of Arts Council staff, particularly those working in music, were very supportive of grassroots music (one referenced their "valiant attempts"), there was little evidence that those in "senior management, strategic planning or senior assessment roles" were equally so.

6.2 A perceived learning curve for all concerned, including those offering support

"It took a while to learn how to do it, how to get the Arts Council to get it, because the assessors didn't understand the sector."

Amongst industry reps who had supported applicants with their SGLM bids, there was a real sense that the Fund had been a learning curve for all concerned: applicants, those in industry bodies trying to support them, and Arts Council staff alike. A number talked about how it had taken time for venues and promoters to understand what the Arts Council meant and needed and vice versa, and for them as support workers to facilitate that. Several described part of their role as being that of a translator.

"It sounds weird to say this, but Covid was an opportunity... Lots of people's first applications were Covid relief applications. It instilled confidence in us and them for SGLM."

Echoing feedback from focus groups and interviews about how the Arts Council's Emergency Response Fund and Cultural Recovery Fund had provided a 'training ground' for applicants, a couple of industry body representatives suggested this was also the case for Arts Council assessors less familiar with grassroots music, as well as for some of their own staff too.

BABY ROCK SAMPLER, MANCHESTER



Photography by Nic Chapman

Laura Robin is the co-producer of baby rock sampler, a series of daytime, family friendly gigs in Manchester. She describes how new partnerships enabled more ambitious programming and led to new audiences for their shows.

Laura, tell us about baby rock sampler and what you applied to the SGLM Fund for

We applied for a pilot of live music events for parents/carers of kids aged 0-5 years. Our project provides additional revenue opportunities for touring artists, reaches new audiences that generally don't get out to gigs, and creates amazing opportunities for kids to experience live music for the first time.

One of Arts Council England's strategic priorities is Cultural Communities, where a collaborative approach is encouraged. Tell us about the benefits that new partnerships brought to your gigs.

We were awarded funding in January 2020 but had to change our indoor venue plans due to the pandemic. We worked with partners Brighter Sound and Manchester International Festival on two outdoor gigs, finding new artists and new audiences through these partnerships. Once we were able to return to indoor venues, we formed a partnership with legendary music venue Band on the Wall – for them we are bringing new audiences and new revenue into the building.

Through the new venue partnership we were able to arrange long term storage of our equipment to run the gigs. This will make a big difference to future events as it costs less for transport and means quicker load in/out times ready for evening events at the venue.

How did the Fund enable you to test or develop the way you do things?

The funding gave us the freedom and confidence to help us try new approaches to running the events and expanded our audience during a difficult couple of years in the live music sector. We expanded our audience from kids under 5 years, to children of all ages, due to the impact of Covid-19 on family time. We also tested new pricing of tickets and agreed a box office split and venue hire deal with our new partner venue Band on the Wall.

We worked with an access consultant to produce a booklet for parents/carers called 'How to listen to music with kids' containing tips and ideas, questions to ask your kids and games to play.

If you had one piece of advice or top tip for other grass roots music promoters/ looking to apply now, what would it be?

Make sure you read the Arts Council's Guidance and give lots of detail on your project, including how you have worked out the budget.

7. What next? Applicant and industry body thoughts



Photography by Libby Malandrone

7. What next? Applicant and industry body thoughts

7.1 Exploring applicant and industry body thoughts about potential post-SGLM Fund support

As well as evaluating how effective the Fund had been in terms of meeting its aims and outcomes, we were also asked to look forward in light of the Fund's planned closure in March 2023, to help inform how Arts Council England might best support grassroots music venues and promoters in the future. To do this, we conducted focus groups and 1-1 interviews to gather feedback from a range of survey respondents and industry body reps¹¹, inviting them to respond to some propositions we developed from our initial survey analysis plus put forward their own suggestions.

Our consultation indicated a widespread concern and consternation within the grassroots music sector about the closure of the Fund, and a desire amongst some to see it remain open; evidence in itself of the impact it's had. Set against the backdrop of the ongoing impact of the pandemic plus the cost of living crisis, key concerns here were about the ability of venues and promoters to find the time to apply and to successfully compete in a wider NLPG field, along with a fear that the Fund's closure might be interpreted by some in the sector that the Arts Council no longer cares about grassroots music venues and promoters. There was also a evidence that, given the success of the Fund, a number of people found it counter-intuitive that the Arts Council would want to close it.

7.2 Apply the learning from the Fund and monitor future developments

Interviewees and focus group participants welcomed the commissioning of this evaluation and that the Arts Council was thinking about how it could apply learning from the Fund to its ongoing support of grassroots music. One industry body representative suggested that having a lead officer within the Arts Council with responsibility nationally for grassroots music would be a good legacy.

Reflecting concerns we heard from these industry representatives as well as focus group participants and interviewees that the closure of the Fund is likely to see fewer venues and promoters applying for support, a number of the former called for the Arts Council to closely monitor application data. Those industry body representatives would like to see the Arts Council be transparent about the number of such applications, along with success rates, and to act on this if they see a significant decline.

7.3 Make application processes and resources as simple, inclusive and relevant as possible

The majority of applicant feedback focused on the need to simplify the NLPG application process and to ensure support resources were clear, relevant and inclusive. The following summarises the main points made by applicants who took part in focus groups or 1-1 interviews:

- There's a need for simpler, music-specific NLPG-related guidance that venues and promoters can easily understand; as part of this, there's overwhelming interest in a jargon buster that would demystify Arts Council terminology.
- Many would welcome specific examples of how what grassroots music venues and promoters typically do relates to Arts Council England outcomes.
- They'd also like to see examples of funded projects in which they will recognise themselves.
- One visually impaired participant argued for video/audio applications, which others without this impairment also thought would help people who aren't good at form filling.

Industry reps who were familiar with NLPG echoed the concerns that some applicants had about the current application form, and said they would like to see a simpler form. More radically, some suggested this could be linked to a simpler process for smaller applications or new applicants who Arts Council particularly wants to see apply, potentially more like an expression of interest or similar to the Developing Your Creative Practice form.

One industry rep who was already encouraging people to apply to NLPG saw the potential for venues and promoters to be more strategic in their applications to this programme, potentially making consortium bids or bids for multi-year funding. They fed back that they would like the Arts Council to highlight the potential for venues and promoters to do this, and to provide examples of similar initiatives that have been supported in the past.

A number of industry body reps echoed comments made by applicants about how difficult it was for venues and promoters to navigate the Arts Council's website and find information that's relevant and understandable. Recognising that this has often been the reason for people initially approaching them for support, they felt that a useful next step would be to improve signposting for those working in grassroots music.

Reflecting the important role that industry bodies are likely to have to play in supporting venues and promoters with NLPG applications, one focus group participant said they would like to be part of "a talking shop where you can chat through your ideas". Others would like to be able to talk to successful applicants, but at the same time they expressed concern over promoters/venues becoming unpaid advisers.

7.4 Work more closely with industry bodies and develop a more joined up approach

A number of industry body reps were keen to see more joined up responses to industry issues, through which the Arts Council and key industry bodies could come together to explore and work together to develop lasting and sustainable responses. They also agreed that the closure of the Fund might provide a focus point for just such a joined up approach around further support for grassroots music¹². Such an approach, they felt, would respond well to the government's tendency to only support initiatives where it sees industry investment too, and to invest in pilot projects that the industry can then adopt.

Some called for the Arts Council to support key sector bodies – Music Venue Trust, Association of Independent Promoters and Independent Venue Week – with appropriate funding over a lasting period. Others identified particular initiatives that they'd like to see the Arts Council support, including a support programme for rehearsal and recording studio providers. Meanwhile, amongst applicants and some industry body representatives, there was also interest in a talent pipeline development fund that could potentially support the development of grassroots music agents and managers¹³.

Taken together, these comments suggested a healthy industry appetite for working with the Arts Council to respond to key industry issues, and perhaps areas of focus for future NLPG applications on the part of industry bodies.

7.5 Look at other capital funding possibilities

Echoing calls also made by some focus group participants and applicant interviewees, a number of industry body representatives called for Arts Council England to look at how it could continue to support the capital development of grassroots music venues. Here, as with applicants, industry body reps were keen to stress the knock on impact that capital development and investment in equipment can unlock in terms of talent, programme and audience development. One talked about the impact that the Arts Council "putting £200K into a venue in one of its priority places would have for the Levelling Up agenda".

At the same time, a number of industry body representatives echoed comments made by venues and promoters that many find it difficult to make a strong case for capital support via the NLPG application form, particularly the one introduced in November 2021. For this reason, there was significant interest in the Arts Council creating a small scale capital fund, to which grassroots venues and promoters (as well as others) could apply. Thoughts about the size of grants such a fund might cover differed, some suggesting it should be for awards of up to £100K, and others that it should focus on up to £400K.

TEAM BLACK PROMOTIONS AT THE HOPE & RUIN, BRIGHTON



Sally Oakenfold runs Team Black Promotions at The Hope & Ruin, a live music venue and pub in Brighton with a rich history of supporting local talent. A grant from the SGLM fund enabled her to support 6 local DIY promoters to create a series of festival days.

Tell us about your SGLM-funded project Sally.

Ruinfest was a collaborative project with 6 local DIY promoters to create 6 unique All Day Festivals in the pub and venue. Each event showcased the promoter and what they are about – via the acts booked, artwork created to promote the event and the workshops offered. We hoped that bigger events would attract a more diverse audience from further afield than usual.

How did the project support these promoters and reach new audiences?

The grant allowed us to do things differently. Working with DIY promoters meant they could put together something really special that wasn't 100% reliant on costs being covered purely by ticket sales. This meant they were able to take much bigger risks with line ups and give some less commercial artists a space to perform.

Having the events spread over a whole day did encourage more people to attend from out of town. Being able to subsidise the ticket price also meant we were accessible to more diverse audiences as the event was affordable.

One of Arts Council England's outcomes is a Creative and Cultural Country. How does running a series of all day festivals support collaboration and develop the culture sector?

The investment allowed us time to do things really thoroughly. Collaborating with the 6 different promoters has allowed us to really innovate and make ideas become a reality. For the first 3 events we worked with more established DIY promoters which allowed us as a venue to learn from them. It also enabled them to do things differently and showcase artists in a way they perhaps hadn't thought of doing. Due to the impact of Covid some promoters we had planned to work with were sadly no longer promoting. Instead, we were able to support some really new promoters to learn how to make an event happen, which meant we had some really exciting and very different events with emerging young artists taking place.

Grassroots music venues are very hard to mouth. Ruinfest has given us the opportunity to really value what we do creatively. It's given us time and money to involve a lot more people in the process which has meant learning from each other and being satisfied we've done everything we could to make each event a success.

How did the Fund develop the way you do things as a venue?

Being able to work with promoters meant we were much more in control of how the events worked within our space. For example, having bands on all day meant the bar and venue were much busier than usual which was great. However this can sometimes impact on our kitchen trade. So we introduced breaks for lunch and dinner which meant the kitchen benefitted instead of losing out. Curating such specific events allowed us to accommodate more diverse audiences and create safer and more accessible spaces where people could feel comfortable alongside each other. It also meant we could have more people involved in delivering the events which allowed us to provide really valuable experience. Obviously this has been enormously helpful as so many people left the industry during the pandemic.

If you had one piece of advice or top tip for other grass roots music promoters/venues looking to apply now, what would it be?

Talk to people, find out what people want, collaborate. Share ideas.

8. Conclusion



8. Conclusion

8.1 What a few years it's been

Little did the Arts Council – or any of us – know that the launch of its Supporting Grassroots Live Music Fund in May 2019 would be followed some six months later by the emergence of the Covid virus and subsequent declaration of a pandemic, whose impact is still very much evident even in 2023.

It's testament to the commitment of those at the Arts Council involved in the Fund's development and delivery – and their understanding of the severity of the pandemic's impact on venues and promoters so reliant normally on ticket income - that in Spring 2022 they successfully advocated for a year-long extension of the Fund, to March 2023.

In this conclusion we reflect on the extent to which the Fund has achieved its outcomes and provide some observations about how the Arts Council could continue to support grassroots music venues and promoters after the Fund closes.

8.2 Some final reflections on outcomes

The Fund's impact has been significant; by July 2022 Arts Council England had invested over £6m in over 250 applications to the Fund¹⁴, themselves as varied and diverse as those who work in grassroots music. Having spent much of last summer exploring the impact the Fund had had, we're not surprised that over two thirds of applicants who took part in our survey about the Fund told us that they felt it had "been a lifeline for grassroots venues and promoters". In this section we provide some final reflections on the evaluation questions we were asked to consider and the extent to which the Fund has achieved each of its outcomes, along with a small number of other observations.

Considerable success in terms of achieving expected outcomes and aims

Helping promoters and venues explore new and/or more sustainable business models

There's no doubt that the Fund has done well in terms of unlocking key outcomes. From solo promoters and husband and wife teams to businesses with teams promoting 300+ shows a year, the Fund has enabled a diverse range of recipients to diversify their programmes; increase their support for young, emerging and/or more diverse artists; test new ways of developing their audiences; improve their physical infrastructure, and test new ideas around their business models. At the same time, many have expanded their role in their local community, building new relationships and reinforcing what many of us in the music sector have known for years: that grassroots venues and promoters are important cultural and economic assets whose contribution to what's now known as 'place making' should not be underestimated. Meanwhile, nearly half of those we surveyed who'd received a SGLM award say they're more financially resilient as a result, with a similar proportion having developed new income streams as a consequence of their SGLM-funded activity.

The breadth of these impacts testifies to applicants having used the Fund to pivot their activity during the pandemic in particular, and to the Fund having catalysed a more general focus on 'business not as usual'. It also indicates how successful it's been in increasing the contribution grassroots venues and promoters can make to the Arts Council's **Let's Create** strategy; all positive in terms of helping identify just how successfully the Fund has achieved its key outcomes and aims, and also unlocked some unanticipated outcomes. Set against the backdrop of a pandemic, this feedback is particularly noteworthy.

It also highlights the inter-dependence of many of these outcomes; how diversifying your programme can help develop new audiences and increase your bottom line; how investment in a new PA can unlock real impacts for a venue's programme and the range of artists they can support. In so doing it's made very clear the connection between investment in grassroots venues' and promoters' physical infrastructure and their ability to make a real contribution to Let's Create. And it's confirmed how investing in these venues and promoters has a significant 'ripple' effect, unlocking outcomes for artists and others working in the grassroots music ecology, and creating jobs and other economic impacts.

Whilst this is all positive news, we need to sound a note of caution about the major challenges facing the majority of grassroots venues and promoters at present. The 'double whammy' of the ongoing impact Covid is having on audience numbers and box office receipts, along with rising energy costs and the broader cost of living crisis, means that the immediate future looks extremely challenging for grassroots venues and promoters. All of this makes it all the more important that those who need further Arts Council investment are supported in the future to apply for NLPG funding.

A positive impact on perceptions about, and engagement with, the Arts Council

Against the backdrop of this impact, it's not surprising that the Fund appears to have done much to address the feeling that some working in grassroots music previously had, that the Arts Council didn't value them. A key focus of our evaluation was on whether the Fund has helped changed perceptions amongst the grassroots live music sector that the Arts Council isn't supportive of them. It's encouraging then to reflect on the fact that nearly 7 out of 10 of applicants who took part in our survey thought the Arts Council values grassroots music, and more than half thought its support of grassroots music is improving.

A learning curve for those not versed in Arts Council language

As well as being tasked to explore the Fund's impact, we were asked to explore what can be learnt from how this ring-fenced Fund has been delivered.

With respondents whose applications were unsuccessful three times as likely as those who received an award to have had no support, feedback attests to how important it is to ensure new applicants not versed in the language of the Arts Council get the support they need. Here, the work done by Arts Council customer service staff and music relationship managers was important and highly valued. There's also no doubt that the support provided by the Music Venue Trust to its members made a real difference to the outcome of numerous SGLM applications. Of course, some applicants were more able than others to access formal industry support, and as one MVT rep said, "there wasn't much time to skill up an entire sector", but between them, that's exactly what those who worked with the hundreds of applicants worked hard to do.

Ring-fenced funding that improved applicant confidence and the quality of applications

This success is measured not just in terms of increased skills, but also increased confidence on the part of many about their ability to apply for Arts Council funding; another question we were asked to explore in this evaluation. Whilst this confidence was dented by the prospect of competing outside of a ring-fenced fund, given the training ground that the Fund – and for many, CRF and ERF as well – has provided precisely because it was delivered as a ring-fenced strand within National Lottery Project Grants (as opposed to a standalone funding programme), we hope these fears are misplaced. We're cheered too by the fact that that around half of our survey respondents anticipate applying for other Arts Council funding in the future.

There were, of course, negative comments about the application process, all useful given that our brief also included exploring what didn't work well, the barriers unsuccessful applicants faced in re-applying and how the Arts Council can continue to support this sector once the Fund closes. Many of those we spoke to found the latest iteration of the NLPG application form in particular unhelpful and hard to get to grips with, and Grantium extremely frustrating. 'What's new?' you might think. 'Lots of people find writing applications hard'. Whilst that's true, most people won't find themselves writing their application at the end of a 16 hour day that started with seeing in a brewery delivery and ended with helping the band load their equipment in their van. Meanwhile, comments made by unsuccessful applicants clearly suggests that many would have benefitted from receiving more feedback about their applications, and that in some cases the lack of such feedback was a real barrier to them re-applying, especially if they had made multiple unsuccessful applications.

Our hope here is that these NLPG-related insights will usefully inform the Arts Council's work once the Fund closes, and help ensure future ring fenced funds are as inclusive as we know the Arts Council wants them to be.

8.3 Exploring what the Arts Council can do to support grassroots live music once the Fund closes

Part of our brief was to explore what the Arts Council could do to effectively support the grassroots live music sector following the Fund's planned closure in March 2023. In doing this, we've taken into account feedback that this closure may be viewed by many grassroots venues and promoters as evidence that the Arts Council no longer values what they do and/or thinks it no longer warrants support. In light of this, and given longer-term outcomes identified in the Fund's theory of change, a priority must be ensuring that such venues and promoters are as equipped as possible to make successful applications to mainstream NLPG funding. To do this, we recommend that the Arts Council creates a transition period strategy and action plan, that includes the development of accessible and relevant resources for applicants alongside a clear sector-facing communications campaign.

Appendix 1.

Methodology and sample frame variables and values



Photography by Toby Keane

Appendix 1: Methodology and sample frame variables and values

1. Our methodology in detail

Online applicant survey

Survey design, distribution and analysis

We constructed our online applicant survey in such a way to create bespoke pathways through it for three different types of respondents: applicants whose first SGLM application had been successful; those who'd not initially succeeded but had subsequently done so, and those who were yet to make a successful application. This ensured we were able to gather as much data as possible about respondents' experiences as both successful and unsuccessful applicants. Beyond this, further filter questions ensured respondents only completed those sections directly relevant to them (e.g. applicants who received bid-writing support were asked about this; those who didn't weren't).

Building on the work done on our sampling frame, we also developed a set of variables that would give us laser-like focus when developing our survey findings. These were:

- Year of most recent application.
- Successful/unsuccessful/ineligible applications.
- Arts Council England region in which they are based.
- Type of applicant (e.g. promoter or venue representative).
- Diversity of applicant.
- Application amount.
- Support they'd received with their application(s).

The survey also included 'opt in' questions, enabling respondents to sign up to participate in focus groups and/or 1-1 interviews, or receive our final report.

Sampling frame

Working with our research partners, Research Interactive, we developed a sampling frame in order to ensure the validity of our evaluation, particularly in terms of ensuring the sample gathered through the survey represented the full range of applicants. Our aim here was to ensure our findings aligned with Arts Council England's monitoring requirements, and to ensure we were able to provide an in-depth, nuanced assessment of SGLM's impact and processes on key groups who might otherwise be under-represented. The sampling frame identified the split of SGLM Fund applicants against a set of key variables defined by the Arts Council and the evaluation team as likely to affect responses. These were:

- Whether successful/unsuccessful/ineligible.
- Whether they were diverse-led.
- Whether they had received previous Arts Council England funding.
- Which year they received funding.
- Which Arts Council area they were based in.

Survey distribution and analysis

All applicants to the Fund¹⁵ were initially invited by email to take part in the survey, with each applicant tagged with an individual reference number (IRN). Using these IRNs, a general follow up email was distributed to applicants yet to respond around a week after this, at the point when response rates began to tail off. Subsequently, we sent targeted emails to non-respondents within any of the identified sampling frame groups where the percentage of survey respondents was significantly lower than the corresponding percentage of applicants, with a bespoke encouragement to them to complete the survey explaining why their particular answers were so important.

We had 82 responses, a response rate of 18%. After we closed the survey, we checked response rates for the key groups identified in the sampling frame to ensure that the answers to the survey represented these sufficiently. The survey data represents across region, diverse-led organisations, whether funding was awarded or not, which year they received funding in and whether they'd had previous ACE funding. This meant re-weighting was not felt to be necessary.

All data was thoroughly checked and was collected and used in accordance with the Market Research Society's Code of Conduct, with special attention given to data protection and data quality.

The table below shows how the breakdown of survey respondents corresponds well to that of Fund applicants overall.

Focus groups

The 19 participants in the 3 online applicant focus groups we conducted were drawn from those who'd indicated via the survey that they would be happy to take part in these. As the long list of potential participants was self-selecting, we worked within these constraints to ensure participants were as representative as possible of the survey population. Designed to deepen our survey insights, each focus group explored the same key topics and questions and all were led by the same facilitators.

Interviews

Our 10 applicant interviewees were drawn from this same longlist, and again we focused on ensuring they were as representative as possible of the survey population. Designed to help us build a more in-depth picture of applicant experience, the online interviews were semi-structured and conducted by team members who also led our focus groups.

2. Sample frame variables and values

The table below uses these variables to illustrate how the breakdown of survey respondents corresponds to that of Fund applicants overall.

- Entire applicant base for which we have valid data (N) = 465. (NB. There were 491 unique applicants in total).
- Survey base = 82.
- Count (#) and percentage (%) for each value within sampling frame given for all applicants and survey respondents.

Variable	All applicants		Survey respondents	
	#	%	#	%
Decision				
Offered	209	45.0%	51	62.2%
Rejected	115	24.7%	13	15.9%
Ineligible	141	30.3%	18	22.0%
Led By				
Female	148	31.8%	38	46.3%
Disabled	35	7.5%	5	6.1%
LGBT	47	10.1%	6	7.3%
BME	102	21.9%	14	17.1%
Area	#	%	#	%
London	104	22.4%	12	14.6%
Midlands	73	15.7%	8	9.8%
North	126	27.1%	24	29.3%
South East	98	21.1%	27	32.9%
South West	64	13.8%	11	13.4%
Decision Year	#	%	#	%
2019/20	135	29.0%	24	24.7%
2020/21	163	35.1%	26	26.8%
2021/22	167	35.9%	47	48.5%
Previous ACE funding¹⁶	#	%	#	%
NLPG	0	0.0%	0	0.0%
DYCP	2	0.4%	0	0.0%
CRF	39	8.4%	9	11.0%
ERF	25	5.4%	3	3.7%
No previous ACE funding	407	87.5%	71	86.6%

Some words about the hub

This evaluation report was produced by the hub, a team of thinkers and doers committed to building the capacity of the music sector that we've grown up in, and continue to be part of. As well as working with clients on research and strategy projects, we develop our own 'hub lab' programmes, that support artists and other creative freelancers and entrepreneurs to have happier, healthier and more sustainable careers and businesses. You can find out more about us [here](#).

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