

# HERE, THERE AND EVERYWHERE

2023





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# Introduction

Jamie Njoku-Goodwin UK Music Chief Executive



Welcome to UK Music's Here, There and Everywhere report, highlighting the powerful presence of music across every corner of the UK. The numbers show in certain terms what we all felt in 2022: the excitement for live music to come back for the first full year since the COVID-19 pandemic. With 14.4 million music tourists helping to generate £6.6 billion in spending across the year and supporting 56,000 full-time jobs, it really was quite the return.

The cultural soft power of music is a driving force behind tourism. The UK's music scene has permeated global consciousness, shaping fashion, art, and even political movements all over the world. British artists have long held an ability to resonate with diverse audiences, transcending both language and cultural barriers.

Of course, live music isn't the only reason people travel to and around the UK. As this report highlights, there is so much more that takes people across the UK for its music. This includes recording at some of the best studios in the world, alongside some of the UK's brilliant songwriters and producers; attending top music conferences across all four regions; studying at world-renowned music education institutions and making impressive pilgrimages to record stores for collectibles you wouldn't find anywhere else.

But we can't take this strength for granted.

There is a growing recognition of the need to support and boost music at the regional level to ensure the UK's music scene can thrive. Local authorities are now actively exploring innovative strategies and initiatives to leverage

music tourism as a driver of economic and cultural growth. This is where this report's toolkit to transform cities, towns and regions into music powerhouses can help.

The toolkit emphasises the importance of supporting the music ecosystem. In turn, this helps areas create a sense of community pride and engagement, as residents witness the transformation of their neighbourhoods into vibrant cultural hubs. By empowering local authorities, regions can tailor their efforts to showcase their area's distinct musical identity, attracting tourists and enthusiasts eager to explore new sounds and experiences.

As this report demonstrates, music has been a key ingredient in the success stories of countless towns and cities. By harnessing the power of music, regions across the UK can generate thousands more jobs, boost economic growth and attract even more visitors.

Music offers huge potential for transformative placemaking - and this report shows how to turn that potential into reality. Whether you are a policymaker, an industry professional or just someone who cares about your local area, this report will have relevance to you. We hope you enjoy it.

# Introduction

**Patricia Yates** VisitBritain/VisitEngland Chief Executive Officer



It is a privilege to write this introduction for UK Music's Here, There and Everywhere report, recognising the significant and valuable role music plays in driving both domestic and inbound tourism.

The impressive statistics speak for themselves. Billions of pounds generated for the UK economy from music tourism, supporting tens of thousands of jobs and small businesses right across the country. This report also demonstrates music's effectiveness in driving immediacy to visit and in encouraging visitors to discover more of the UK.

Behind these statistics of course are the amazing people and businesses who drive our outstanding, innovative music industry. Their efforts attract the millions of visitors who come to enjoy our live music scene and vibrant musical cities, from Liverpool to Glasgow, Cardiff to London, Manchester and beyond. Whether soaking up the atmosphere at one of our legendary festivals, a gig at our world-famous pubs and clubs or a concert at our first-class venues, these experiences create memories of a lifetime, building friendships, cultural connections and inspiring future travel.

Music's ability to promote messages of warm welcome, a top motivator in destination choice, and an emotional connection, was well and truly on show during the UK's recent hosting of the Eurovision Song Contest on behalf of Ukraine. This global event, with our music offer

and welcome centre stage, saw hundreds of thousands of visitors come together in Liverpool, United by Music, as the 2023 theme suggested. It showed our creativity, hospitality and ability to hold live events of the highest calibre.

We know there is pent-up demand for travel and our research shows almost half of travellers already associate the UK with music. A further 44% of tourists VisitBritain surveyed were keen on attending a live music festival on or not on holiday abroad. Music tourism offers hugely valuable and exciting opportunities to influence destination choice and bookings, plus helps us build on the strong recovery we have seen in overseas visitor spending in the UK.

We look forward to continuing our work with the industry to promote our globally renowned music offer, inspiring even more visitors to come and experience it for themselves, boosting economic growth from tourism and supporting businesses and talent right across Britain.

# Overview

## DEFINING A MUSIC TOURIST\*

The Office for National Statistics (ONS) defines a domestic tourist as someone who has travelled outside of their natural environment. For this report a domestic music tourist is defined, through ticketing postcode data, as anyone who has travelled at least three times the average commute for their region. A foreign tourist is defined as those who have travelled from abroad.

Total music tourism spend covers both direct and indirect spend. This includes ticket sales, food and beverage sales, merchandise, venue parking, camping fees, accommodation, travel, and additional spending outside of venues while visiting the UK for a live music event.

Employment from music tourism captures jobs sustained by music tourism and is measured in terms of full-time equivalency.

## 2022 IN NUMBERS

In 2022 the number of music tourists reached a staggering 14.4 million, of which 13.3 million were domestic tourists and 1.1 million were foreign tourists.

Festivals and concerts got people out of their homes and spending money - as the impressive total music tourism spend of £6.6 billion in 2022 highlights.

Employment from music tourism hit 56,000, highlighting the key contribution the sector adds to the workforce.

These numbers reflect some of the brilliant activity that took place in 2022. Large-scale tours from homegrown artists including Ed Sheeran, Elton John and Dua Lipa swelled the number of music tourists at concerts to 30.6 million across 2022.

Glastonbury Festival in Somerset brought British artists including Sir Paul McCartney, Wolf Alice and Joy Crookes to the Pyramid Stage contributing to the total festival attendance figure of 6.5 million.

## A SENSITIVE ECOSYSTEM

Amidst the excitement, there are clear concerns about some of the issues currently facing the music industry.

Festivals and music venues struggled to survive during the COVID-19 pandemic, with closures and financial difficulties leaving a void in the local music scene. Data from the Association of Independent Festivals (AIF) found one in six UK festivals came to an end during the COVID-19 pandemic<sup>1</sup>. Since the start of 2023 the Music Venue Trust (MVT) have estimated one music venue is closing every week<sup>2</sup>.

Recording studios faced their own set of challenges, as the pandemic limited the opportunities for artists to record and collaborate, resulting in delays, creative inertia and lack of funding, alongside increasing energy costs and supply chain demands.

All while creators and performers, especially those early in their career, are dealing with higher costs and stagnating opportunities.

## BUILDING MUSIC POWERHOUSES

It's more important than ever that we protect the musical infrastructures that do so much for our towns and cities and support the industry pipeline.

This report concludes with four recommendations to transform cities and towns into music powerhouses. By putting music at heart of planning, creating registers with available spaces, enshrining music in all regeneration and partnership opportunities, setting up music advisory commissions, local government can make music thrive and support the industry with some of these challenges, boosting music in every corner of the country.

## NUMBER OF MUSIC TOURISTS

14.4 MILLION



DOMESTIC  
13.3 MILLION



FOREIGN  
1.1 MILLION

## MUSIC TOURISM SPEND

£6.6 BILLION

## EMPLOYMENT FROM MUSIC TOURISM

56,000

## TOTAL LIVE MUSIC ATTENDANCE

37.1 MILLION



CONCERT  
30.6 MILLION



FESTIVAL  
6.5 MILLION

\*More details on these definitions can be found in the full [Here, There and Everywhere methodology](#) document on the UK Music website.



Dream Wife performing at FOCUS Wales 2023 | Brent Jones ©

# Music in the Regions

Music tourism is a thriving industry across all 12 regions in the UK. British artists, bands, songwriters, producers, mixers, and engineers are some of the most renowned in the world. At its very core this global success begins with local music scenes, where artists cultivate a sense of identity and following within their community.

The numbers in this report provide a valuable insight into the visitor numbers and economic contributions - in terms of spending and jobs supported - associated with music tourism in each place for 2022.

Alongside these calculations, the descriptions for each region aim to fully capture the diverse range of activities and experiences that contribute to the ecosystem of the music industry. It highlights some of the best and biggest experiences that took place in 2022, alongside the artists, studios, education institutes, record stores and more that supported it. Whilst all these examples won't be reflected in the number of music tourists or music tourism spend figures, it helps us to showcase all the reasons people visit or travel around the UK for its music.

Presented alongside this regional data are five case studies that highlight some of the interesting and exciting activities happening across the UK; linking music, tourism, regional strengths, and local government.

By examining each region, we gain a deeper understanding of how local music scenes foster creativity, nurture talent, and contribute to the cultural fabric of the nation. Through this lens, we aim to highlight the vital role of music tourism in the UK and its significance in preserving musical heritage and shaping the identity of these regions.



Self Esteem performing at Connect Festival 2022 | Shutterstock - Calum Mackintosh ©

# East of England



The East of England is a vibrant hub for music and cultural tourism. Norwich remains a major destination for live music, with venues such as the Norwich Arts Centre, The Waterfront, and the University of East Anglia's (UEA) The LCR music venue, run by the Union of UEA Students, bringing top acts from around the country to the region.

New festivals such as Houghton Festival in Norfolk have emerged in recent years, featuring world-class electronic music acts, immersive art installations and a special 24-hour music licence, so the fun never stops. The Cambridge Folk Festival remains a beloved local tradition, while Latitude Festival, which takes place at Henham Park, featured top British talent in 2022, including Lewis Capaldi, Foals and Little Simz.

Beyond live music, the East of England is home to innovative music organisations, such as Noise Solution, a Suffolk-based social enterprise that uses music and technology to support at-risk young people, through one-to-one music mentoring programmes. Studios including Lime Green Monkeys and Headline Music Studios are also attracting new visitors to the area.

## NUMBER OF MUSIC TOURISTS

**570,000**



DOMESTIC  
**540,000**



FOREIGN  
**30,000**

## MUSIC TOURISM SPEND

**£332 MILLION**

## EMPLOYMENT FROM MUSIC TOURISM

**2,920**



The Urban Soul Orchestra performing at Classic Ibiza 2022 | Classic Ibiza - Stately House Music Events - David Evans ©



# East Midlands



The East Midlands music scene continues to attract fans from all over. In 2022, Y Not Festival in Derbyshire saw Courteeners, Blossoms and Sleaford Mods take to the stage. Meanwhile, Download Festival brought international rock fans to Donington Park with Scottish band Biffy Clyro headlining. Music venues across the region also attracted big hitters, such as Grantham-born Holly Humberstone's home show in December 2022 at Rock City, Nottingham.

The Leicestershire Music Hub has been creating new and innovative digital resources for young people in the music industry as part of their overall goal to increase digital capabilities across the region. The hub brings a huge range of music genres to young people, including traditional Asian and African music.

Studios such as the Parlour Studios in Kettering, situated in a converted milking parlour on an old dairy farm, and The Old Library Recording Studio in Mansfield, showcase just some of the reasons musicians, songwriters and producers are visiting the region to create and record new music.

## NUMBER OF MUSIC TOURISTS

510,000



DOMESTIC  
480,000



FOREIGN  
30,000

## MUSIC TOURISM SPEND

£321 MILLION

## EMPLOYMENT FROM MUSIC TOURISM

3,150



Nova Twins performing at Download Festival 2023 | Sarah Louise Bennett ©

# London



Whether it's London Calling by The Clash or London Boy by Taylor Swift, the UK's capital city has always appealed to musicians. It is home to diverse and recognisable events, from BBC Proms, for an eight-week season of classical music, to Boiler Room, for dance-music nights broadcast worldwide.

London's Abbey Road and Metropolis Studios are well known for their work with some of the UK's biggest acts, with the former attracting tourists to take photos by the famous Beatles' zebra crossing. Studios in London are helping to develop some of the most exciting new acts from the UK and abroad, including JBJ Studios in Notting Hill and Urchin Studios in Hackney Wick.

London is home to celebrations you wouldn't find anywhere else. Notting Hill Carnival has music at its core, as the only full-scale carnival in the world to feature multiple static sound system, plus live performances. The annual event draws upon a diverse range of musical influences, blending elements of calypso, soca, reggae and punk and attracting participants and spectators from all around the globe.

## NUMBER OF MUSIC TOURISTS

**4.9 MILLION**



DOMESTIC  
**4.4 MILLION**



FOREIGN  
**500,000**

## MUSIC TOURISM SPEND

**£2 BILLION**

## EMPLOYMENT FROM MUSIC TOURISM

**13,200**



Knucks performing at Wireless Festival 2022 | Alex Piper ©

# North East



The North East music scene is full of exciting new talent, venues, and organisations, giving people a reason to visit the region.

Generator, formed in 1991 and based in Byker, Newcastle Upon Tyne, is the leading creative talent development agency for the region. Their work supports the ecosystem of the North East music scene, through business development, education and talent development. The organisation delivers a year-round programme of activity ranging from fully funded courses to one-off workshops, seminars and networking events as well as a major music festival - Generator Live.

Generator Live has provided a platform for chart-topping local-grown talent such as Nadine Shah and Sam Fender. Boosting the North East profile around the world, Fender's fans have embraced the Geordie brand, wearing t-shirts featuring his name and the Newcastle Brown Ale logo and buying tickets for his home show at the Newcastle United Stadium, St James' Park.

## NUMBER OF MUSIC TOURISTS

**350,000**



DOMESTIC  
**330,000**



FOREIGN  
**20,000**

## MUSIC TOURISM SPEND

**£165 MILLION**

## EMPLOYMENT FROM MUSIC TOURISM

**1,690**



Ruth Lyon performing at Generator Live 2022 | Victoria Wai ©

# North West



The North West music scene holds a legendary status, with bands including The Beatles, The Stone Roses and Oasis encouraging visitors from all over the world to visit the backdrop to some of the most well-loved music the UK has ever produced.

Piccadilly Records in Manchester is an essential part of any trip to the trendy Northern Quarter, with its impressive range of new release vinyl and CDs. A few doors down at Vinyl Exchange music fans can find some of the best, collectable second-hand records anywhere in the country.

With such strong musical heritage, it's no surprise studios across the region are thriving. Catalyst Studios in St. Helens is home to music producer duo Sugar House who have been discovering and developing a host of local talent in the North West. Whilst the unique Eve Studios in Stockport is filled with vintage boutique and recording equipment. They love to do things the old way as much as possible and attract visitors from all over the country who think the same.

## NUMBER OF MUSIC TOURISTS

**1.9 MILLION**



DOMESTIC  
1.8 MILLION



FOREIGN  
120,000

## MUSIC TOURISM SPEND

**£696 MILLION**

## EMPLOYMENT FROM MUSIC TOURISM

**6,510**



MistaJam performing at Creamfields North in 2022 | Jack Kimber ©

# North West: Case Study

## Liverpool City Region Music Board

*The Liverpool City Region Music Board (LCRMB) was established in 2018 as an independent, sector-led panel of experts and influential figures from the world of music. Board member and opera singer, **Jennifer Johnston**, shares the work they've achieved so far, including staging Eurovision in May 2023 and the importance of its lasting legacy.*

Liverpool is leading the way as a global music city and the LCRMB is charged with cementing the city region's position as one of the world's music capitals, working to ensure music businesses and communities have a stronger voice in local and regional decision-making. The LCRMB is pursuing a number of skills, training and talent development projects supported by £1.6 million of Strategic Investment Funding awarded by the combined authority.

The budget is allocated to mapping the entire sector and supporting the music ecosystem. Since the 1980s, culture has been central to the Merseyside's renewal and regeneration strategies, with the music sector generating almost £100 million of turnover per annum and music tourism contributing a further £100 million<sup>3</sup>. Music has created a distinctive sense of place, grown the visitor economy, boosted the city's image, and developed the creative industries, as well as addressed problems of inclusion and deprivation.

Several members of the Board were instrumental in bringing Eurovision Song Contest to Liverpool in May 2023, playing key roles in devising and pitching the proposal to the European Broadcasting Union (EBU) and the BBC, plus devising and delivering a host of fringe events and Eurovision-associated activities. The result was a supersized Eurovision, smashing records with the most watched final globally in the competition's history, and demolishing visitor targets of 100,000 with over 500,000 additional people arriving in Liverpool<sup>4</sup>.

The Eurovision Legacy Group (ELG) was established to ensure a lasting impact of positive change across Liverpool<sup>5</sup>, especially after the honour of staging the event for the people of Ukraine.

The ELG's primary legacy aims are to:

- Maximise Liverpool's UNESCO City of Music Status with the launch of Liverpool Music City, an online hub for the music industry in Merseyside.
- Improve the region's night-time transport infrastructure to support a sustainable and strong regional live music economy.
- Secure a commitment from companies that sponsor Eurovision in Liverpool to establish a music education foundation.

- Work with Marketing Liverpool and Visit Liverpool to emphasise the region's vibrant and diverse live music ecology.

The LCRMB was delighted to welcome Eurovision to Liverpool, to celebrate Ukraine, unity, diversity and freedom, and broadcast to the world: 'This is Liverpool, music city. Come on... feel the noise'.



# Northern Ireland



The Northern Irish music scene is a vibrant community that has gained worldwide recognition for its unique blend of traditional and contemporary sounds.

At the heart of this scene is the Oh Yeah Centre, a renowned music hub in Belfast that serves as a catalyst for creativity and collaboration, providing a platform for emerging musicians to showcase their talent and connect with industry professionals. Down the road is Stoney Road Studios, one of a few residential studios in Northern Ireland, which offers international visitors the chance to develop new music in the heart of this vibrant scene.

One of the highlights of the Northern Irish music calendar is the Stendhal Music Festival, held at Ballymully Cottage Farm in Limavady since 2011. Stendhal is celebrated for its eclectic line-up and community focus, featuring a mix of local and international acts across various genres. From indie rock to folk, electronic to hip-hop, Stendhal offers something for everyone, promoting inclusivity, artistic expression, and the power of the Northern Irish music sector.

## NUMBER OF MUSIC TOURISTS

270,000



DOMESTIC  
250,000



FOREIGN  
20,000

## MUSIC TOURISM SPEND

£136 MILLION

## EMPLOYMENT FROM MUSIC TOURISM

1,280



Charlie Hanlon performing at the Oh Yeah Centre | Ciara McMullan ©

# Northern Ireland: Case Study

## Belfast Music Walking Tour

*The Belfast Music Walking Tour highlights the rich history of music in the city, from classical to traditional Irish, jazz to punk, electronic to choral music - and everything in between. Supported by the Oh Yeah Centre, Visit Belfast and Tourism Northern Ireland, founder **Dolores Vischer** of Creative Tours Belfast highlights the power of collaboration in making it a success.*

During the COVID-19 lockdown I studied for a Belfast Green Badge, a tour guiding qualification awarded by the UK Institute of Tourist Guiding. One course module required us to prepare and script a new walking tour of Belfast. I knew that a bid for UNESCO City of Music designation was being prepared. There was no hesitation at all about what mine would focus on - music. Shortly after, the Belfast Music Walking Tour was officially launched in April 2022.

I'm a great believer in the power of collaboration. Better to work with others where possible. The tour is offered in association with the Belfast Oh Yeah Centre, where each tour ends, often with a half hour performance by a local rising star who has come through the Oh Yeah talent development programme.

I liaise and collaborate with Visit Belfast and Tourism Northern Ireland to help promote my tour, which is now included in Tourism Northern Ireland's Embrace a Giant Spirit collection of experiences for visitors. The Belfast City Council music team have also been supportive.

The tour takes visitors to a Victorian music hall, the city's oldest church building, a new cultural space, a record shop, our oldest pub, open air performance sites and more. Most importantly, I have a speaker system and we play a soundtrack of local legends of the Belfast music scene, past and present, along the way. We have a lot of local Northern Ireland visitors, plus many from the rest of Ireland, the UK and further afield. Increasingly, I am getting more enquiries from international visitors planning their trip to Belfast.

I'm of an age where the first bands I went to see live in Belfast in the late 1970s were punk bands. Punk really meant more in Belfast back then when there was so little for young people to do, and it was one thing that brought together folk from all communities across the city. It deserves an important place in Belfast's music heritage, especially with all the great emerging punk bands of today's scene.

With a little persuasion I was encouraged to develop a new tour, the Belfast Punk Music Walking Tour in Spring 2023. A pilot run was popular, and The Lyric Theatre asked if I might offer further dates during the run of their Good Vibrations production, about the 1970s Belfast record shop and label of the same name set up by Terri Hooley. I ran the tour five times in May: feedback was good, and I love doing it, so I've added a series of dates to run the punk tour again. I can't wait to see where it goes next.



# Scotland



The Scottish music scene has long been recognised for its rich and diverse offerings, showcasing a remarkable blend of traditional folk music, indie rock, electronic sounds, and everything in between.

Iconic venues such as the Barrowland Ballroom in Glasgow or The Queen's Hall in Edinburgh attract music-lovers from all over the world. The independent record label, Chemikal Underground, has helped to foster some iconic Scottish music including post-rock band, Mogwai. Meanwhile, Edinburgh International Festival and St Magnus Festival add to the Scottish classical music scene.

At the centre of this musical tapestry is Wide Days Festival, an annual celebration of Scotland's thriving music industry. It stands as a platform for emerging Scottish artists and provides an invaluable opportunity for networking, collaboration, and discovery. The festival draws in industry professionals, including promoters, labels, agents, and managers, fostering connections that propel Scottish talent onto national and international stages. With a line-up encompassing a multitude of genres, Wide Days Festival captures the essence of Scotland's musical identity, presenting both established acts and rising stars.

## NUMBER OF MUSIC TOURISTS

1.5 MILLION



DOMESTIC  
1.4 MILLION



FOREIGN  
110,000

## MUSIC TOURISM SPEND

£581 MILLION

## EMPLOYMENT FROM MUSIC TOURISM

5,340



Uninvited performing at La Belle Angele, Wide Days 2023 | Gaille Beri ©



# Scotland: Case Study

## Black Bay Studio

*Black Bay Studio is a high-end residential recording facility located on an island in the Outer Hebrides, Scotland. The studio prides itself on being the “UK’s most remote recording studio”, accessed via daily flights to Stornoway or ferry services to the mainland.*

*The studio incorporates spacious and beautifully designed acoustic rooms, a comprehensive equipment list, comfortable accommodation a dedicated team of staff who treat making records as a way of life. Founder and owner **Pete Fletcher** shares more about how it began, why people make the journey and why music in the UK is so special.*

Black Bay Studio opened in 2017. It was the product of a 15-year ambition to have a residential studio by the sea. I’ve had other studios in the city before but wanted to escape. It took a while for the word to get out and to have some clients to build our reputation, but it steadily grew for the first two to three-years. COVID-19 brought a couple of years of disruption, but we’ve been flourishing since.

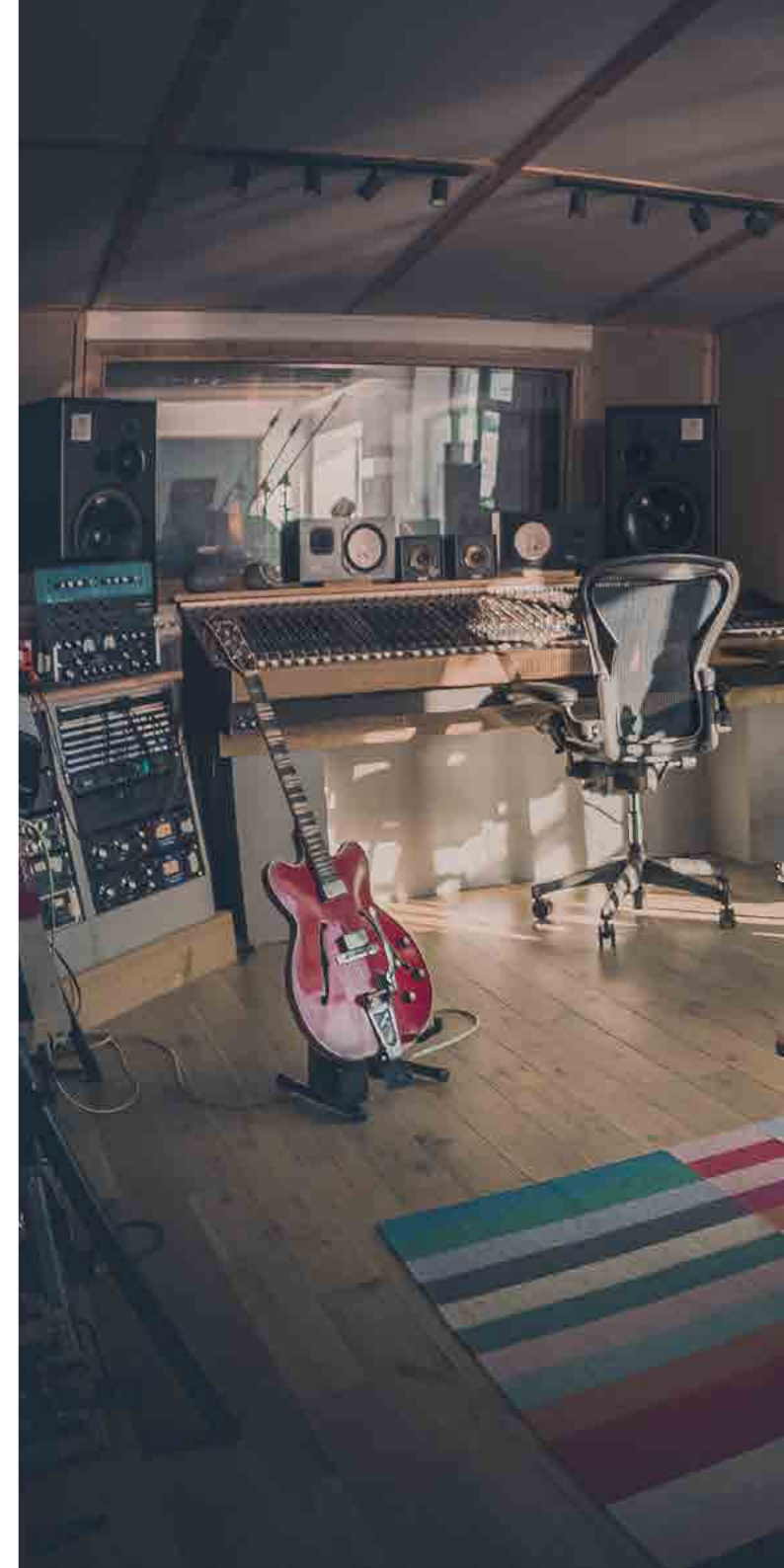
For our clients it’s an escape, a way to get rid of any distractions and be somewhere inspiring to indulge in their creative process. It’s also a really great studio. We have a lot more space than most studios, particularly in our budget range, plus big windows with the ocean on

the doorstep. The location is stunning plus the whole idea of a long journey and ferry to a remote, storm-battered island, is appealing to folk making an album, which is a big deal. You don’t get to do it many times in a lifetime and so it’s making that more of an experience and an adventure.

We have had a few visitors from outside the UK, including Switzerland, Belgium, Germany, USA, Estonia, France. They love it. It’s such an alien environment compared to anywhere else. It’s a similar experience whether you’re coming from Brussels or from London, it’s a total perspective changer. Less so for Highland and Island-based bands, of course, but they come because they like to be connected to the place that has inspired their music.

When setting up the studio we received funding from the Scottish Government agency, Highlands and Islands Enterprise (HIE) and from LEADER (Local council administered European funding). Together with our own investment, this paid for the redevelopment of the fish factory into the recording studio. There is no way we could have ever dreamt of achieving what we have without that funding, and HIE have continued to support us by offering additional match funding when we’ve taken on additional developments.

If you could only listen to music from one country for the rest of your life? It would have to be the UK for a lot of the people in the world, and if not, we’d definitely be in the mix. I think it’s the thing we’re best at really.



# South East



The green and pleasant land of South East England has helped make it an area that encompasses several well-known festivals, including the eclectic Wilderness Festival in Oxfordshire and opera-orientated Glyndebourne Festival in East Sussex. As the coastal hub of creativity, Brighton is home to the annual Great Escape Festival, which attracts emerging and established artists from around the world, plus music industry professionals drawn to the conference and networking opportunities.

Music production is particularly thriving in the region. ARC Studios in Oxfordshire, Rimshot in North Kent Downs and Echo Zoo in Eastbourne are just some of the studios in the South-East creating the best new music and attracting world-renowned singers, songwriters, producers, and mixers.

There are also exciting social enterprises nurturing local talent. Audio Active, formed in Brighton with a second spot now in Worthing, is a non-profit organisation that creates social change through music. With a key focus on helping young people's mental health, the focus is all about creativity as an emotional outlet.

## NUMBER OF MUSIC TOURISTS

960,000



DOMESTIC  
895,000



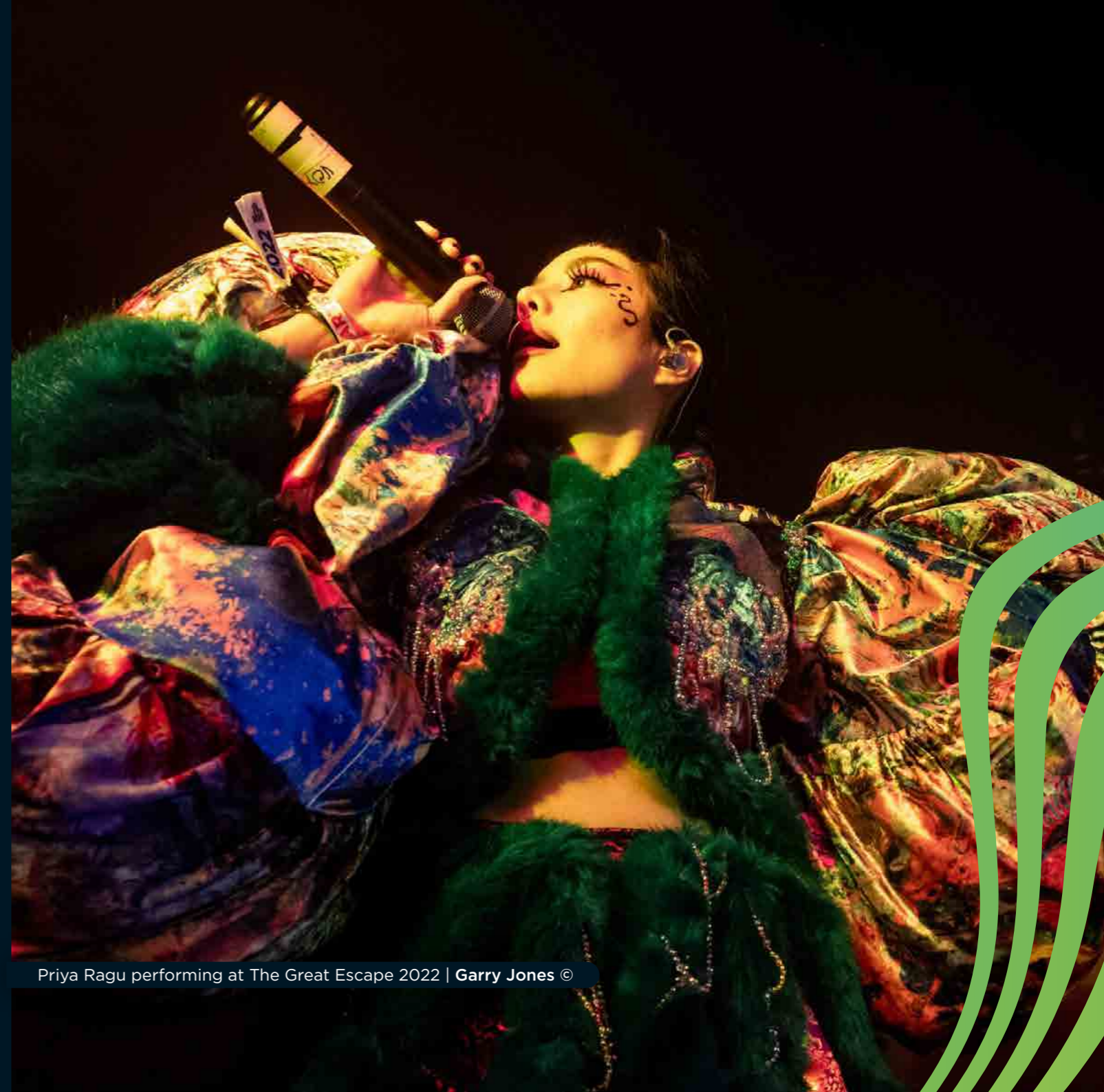
FOREIGN  
65,000

## MUSIC TOURISM SPEND

£608 MILLION

## EMPLOYMENT FROM MUSIC TOURISM

4,860



Priya Ragu performing at The Great Escape 2022 | Garry Jones ©

# South West



Ask many people about the UK music scene and they will think of Glastonbury Festival. In 2022 the capacity increased by 7,000, with the number of people on site rising to 210,000, making it the largest greenfield music and performing arts festival in the world. It's not the only festival in the area bringing in superb talent. In 2022 Barn on the Farm featured successful new artists Easy Life and Griff, Boardmasters headlined George Ezra and Disclosure, and NASS Festival showcased Headie One and Mabel.

The music ecosystem in the region is supported by strong music education institutes. Everyday is Spatial is a two-day specialist music conference hosted by the music team at the University of Gloucestershire. It offers researchers, practitioners, and industry professionals from all over the world the opportunity to share and discuss the practical discourse around spatial audio.

Many studios in the South-West are attracting new visitors too. Green Room Studios in Upton in East Devon has become a key location for the UK's growing folk music scene. Whilst Echo Sound Studios in Dorset is a leader in inclusivity and thoughtful design, with a focus on accessibility including wheelchair friendly access.

## NUMBER OF MUSIC TOURISTS

1.1 MILLION



DOMESTIC  
1 MILLION



FOREIGN  
53,000

## MUSIC TOURISM SPEND

£683 MILLION

## EMPLOYMENT FROM MUSIC TOURISM

7,040



Tom Grennan performing at Broadmasters 2022 | Will Bailey ©

# South West: Case Study

## Cheltenham Festivals Accessibility and Sustainability Toolkit

*A new Accessibility and Sustainability Toolkit has been devised in a trail-blazing partnership between arts and events organisations Cheltenham Festivals, Vision:2025, music-focussed disability charity Attitude is Everything and Cheltenham Borough Council. The toolkit offers a self-assessment system to help event organisers of all sizes, not just understand their accessibility and sustainability scores, but also improve them. The project offers an innovative way for the live music industry to work alongside local government in the future. Cheltenham Festivals' Innovation Manager, **Andrew Lansley**, explains how it can make events better for both people and the planet.*

The toolkit began with a very simple aim: to make live events better for everyone. I first began thinking of a toolkit when I was working on accessibility in music research at the University of Gloucestershire alongside Attitude is Everything (AIE). Once I took up a post at Cheltenham Festivals, I was given the support to begin to bring people together in the live events sector, to try and co-ordinate and facilitate change across the industry.

In October 2022, I attended the launch of the Green Events Code of Practice (GECOP) and began to incorporate both it and the AIE charter into Cheltenham Festivals' strategy, in a practical

toolkit we had been working on with Cheltenham Borough Council. Later, I was introduced to Chris Johnson at Vision:2025. Two calls later and we were presenting the project at the Event Production Show in London and taking sign-ups for a pilot project from local authorities across the UK.

It uses a framework developed by specialist communities within the live events sector to standardise practice across an entire regional economy. Broadly speaking there are two areas event and festival organisers find challenging in this respect: variance across different local authorities and the lack of a statutory framework on which to base their accessible and sustainable practice.

This toolkit integrates these community-driven standards into a licensing commissioning process that produces three distinct outcomes:

- Advisories for the event organisers, articulated within a social value model.
- Reporting, and potentially enforcement detail, for event commissioning groups or Safety Advisory Group (SAG) officers.
- Aggregate data that will allow for identification and analysis of priorities, producing a people and planet first cost saving strategy for the organisers.

Cheltenham Borough Council became an early adopter of the project, but all partners plan to make the toolkit available as an online tool to help event organisers across the UK - and the world - transform their events for the benefit of diverse populations and the planet. We are already working with other partners, including Manchester City Council, to explore how the tool can provide workable solutions across a range of uses and contexts.

This work is so important because intersectionality is a key part of sustainability; if it doesn't work for everyone then it cannot be sustainable. One of the aims of the project is to help promote culture for everyone, forever. Taking a 'whole economy' approach to collaboration at this scale has brought so much to our town already. We can't wait for it to be shared wider.



# Wales



Wales, deservedly known as “The Land of Song”, has a rich musical heritage deeply rooted in its culture. For centuries, the Welsh have celebrated music as an integral part of their identity, with choral singing and traditional folk music playing a central role in community gatherings and national events.

A notable event in the music calendar is the Focus Wales conference and festival. This annual gathering brings together industry professionals, artists, and music enthusiasts from around the world to celebrate and promote Welsh music. With a diverse line-up of performances, panel discussions, and networking opportunities, Focus Wales serves as a platform for emerging Welsh talent to gain exposure and build valuable connections within the music industry.

Studios in Wales have also been making monumental hits and bringing new visitors to the region. Rockfield in the Wye Valley, the first residential recording studio in the world, has been recording era-defining records in every decade since the 70's, from Queen to Echo & the Bunnymen to Oasis to Yola.

## NUMBER OF MUSIC TOURISTS

510,000



DOMESTIC  
480,000



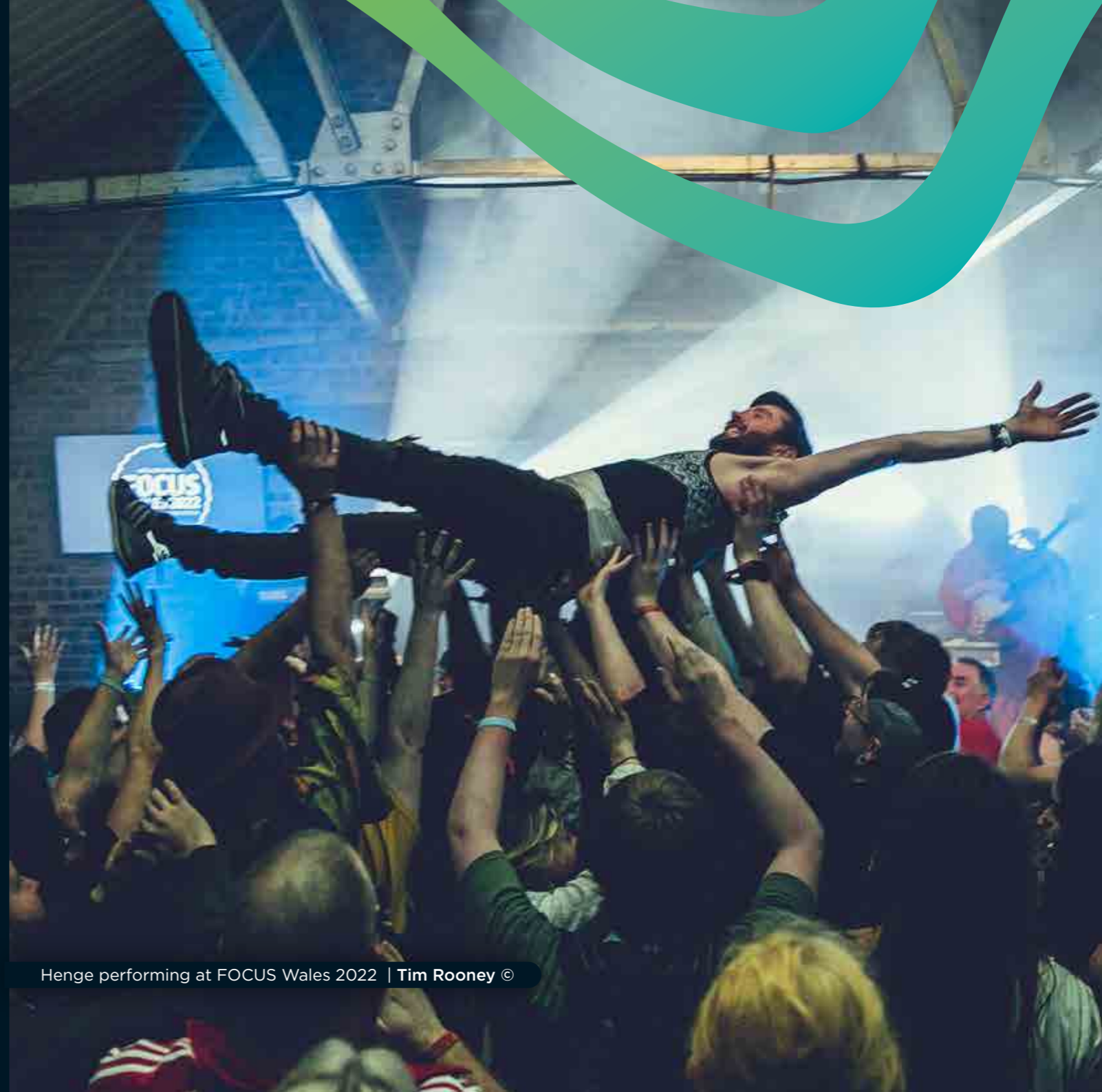
FOREIGN  
30,000

## MUSIC TOURISM SPEND

£218 MILLION

## EMPLOYMENT FROM MUSIC TOURISM

2,470



Henge performing at FOCUS Wales 2022 | Tim Rooney ©

# Wales: Case Study

## Dydd Miwsig Cymru

**Dydd Miwsig Cymru**, or *Welsh Language Music Day*, celebrates the diverse and vibrant Welsh language music scene, showcasing the talents of artists across all genres, from indie, punk, funk, folk, electronica to hip hop and everything in between. Usually held on the first Friday in February, it encourages people of all ages and backgrounds to discover the Welsh language music scene.

Dydd Miwsig Cymru aims to introduce Welsh language music to new audiences by celebrating music being made in Welsh and the artists making waves at home and internationally. In the past 12 months, more than 70 albums and 140 singles have been released in the language, while songs have been performed on stages from Glastonbury to Eurosonic in the Netherlands.

Welsh language music is hailed as a vital resource for learners of the language. It is a crucial part of the Welsh Government's long-term vision to see a million Welsh speakers as well as doubling the daily using of Welsh by 2050.

Business and other organisations also back the event, with the likes of EE, Dŵr Cymru (Welsh Water), Marks and Spencer, Admiral, John Lewis, Waitrose, KFC, Co-Op, BT and Lush showing support by hosting gigs, pledging to add Welsh language music to their playlists on an ongoing

basis, playing only Welsh language music in their offices and stores on the day and sharing Welsh language music playlists with their thousands of followers on social media.

Live events were at the heart of this year's Dydd Miwsig Cymru with more than 30 gigs and events happening across Wales and the world- from Cardiff, Swansea, Aberystwyth and Wrexham to Budapest - in what was the biggest and best-attended Dydd Miwsig Cymru to date. The events ranged from collaborative rap workshops in schools, to gigs at pubs, clubs, community hubs and college campuses.

In 2023, a new £100,000 fund was announced by Jeremy Miles MS, Education and Welsh Language Minister to help promoters and community groups put on live shows through mentoring and skill-sharing. The scheme, titled Miwsig, will focus on supporting communities to create spaces to use Welsh through live music in their communities.

This year also saw the launch of Sound of Miwsig, the first annual poll of the artists making waves in Welsh language music in 2023, voted for by industry experts.

BBC presenter and Dydd Miwsig Cymru ambassador, Huw Stephens, said it was fantastic to see live events at the centre of the event.

“The day is about bringing people together and reminding us that Welsh belongs to everyone - and there is no better way for all ages to experience new music than at a live gig or event. We're shining a spotlight on the variety of genres in the Welsh language music scene.”



# West Midlands



The West Midlands music scene is characterised by the significant role the region has played in shaping various genres, including rock, indie, electronic, hip-hop, reggae, and classical music. In 2022 Radio 1's Big Weekend, hosted in War Memorial Park, Coventry, displayed this key genre-fluidity as British stars Harry Styles, Mabel, Aitch, and Becky Hill take to the stage.

A strong music education scene has been developing in the region, including excellent music departments at Coventry University and Birmingham City University, School of Media. The Pump, based in Birmingham, is a hub for young people interested in music and creative arts. It provides rehearsal spaces, recording studios, and performance opportunities for local musicians, enabling them to develop their skills and collaborate with fellow artists alongside events, and mentoring programs for aspiring musicians from all over.

Otter Head Studios in Rugby, Gospel Oak Studio in Warwickshire, Vada Recording studios in Alcester and Magic Garden Studios in Wolverhampton highlight the sheer breadth of activity going on across the region.

## NUMBER OF MUSIC TOURISTS

940,000



DOMESTIC  
890,000



FOREIGN  
50,000

## MUSIC TOURISM SPEND

£433 MILLION

## EMPLOYMENT FROM MUSIC TOURISM

4,180



Otterhead Studios in Rugby | Otterhead Ltd 2023. Photo: Mike Banks ©

# Yorkshire and the Humber



Yorkshire and the Humber has nurtured a plethora of successful musicians across multiple different genres over the years. Well-known names including Arctic Monkeys, Pulp and the Human League have paved the way for new artists such as YUNGBLUD, Self Esteem and English Teacher. Given iconic venues like The Leadmill, St George's Hall and Brudenell Social Club are all in their back yard, who would expect anything different?

Music courses at Leeds Beckett University and the music-specific Leeds Conservatoire continue to be a key attribute to the region's music ecosystem. With a strong emphasis on contemporary music and a growing number of international students, the Conservatoire provides a supportive environment for aspiring musicians, helping them develop their skills and knowledge alongside access to state-of-the-art facilities and tutors who are active musicians and experts in their field.

These university programmes are well supported by strong studios in the region including Chairworks Studio in Castleford, built within an old Victorian factory, and the grassroots focussed Gafro Studios in Elland, West Yorkshire.

## NUMBER OF MUSIC TOURISTS

860,000



DOMESTIC  
810,000



FOREIGN  
50,000

## MUSIC TOURISM SPEND

£384 MILLION

## EMPLOYMENT FROM MUSIC TOURISM

3,360



First Direct Arena, Leeds | Shutterstock - James Matthew Birchall ©



# Music on a Global Scale

Much of this report highlights why people travel between the nations and regions in the UK, but as the data shows the UK's international presence is a key part of the story, with over one million visitors coming from abroad in 2022 to attend live music events.

International visitor spending is a big part of music tourism. International visitors generally spend more in the UK with additional spending on apartments or hotels plus at restaurants, bars, and shops over multiple days.

The UK's biggest musical exports made a huge impact abroad in 2022. Harry Styles, Glass Animals, Elton John, Dua Lipa, Ed Sheeran and Adele made in to the IFPI's global charts for the top 20 best-selling singles of the year across all digital formats<sup>6</sup>. More British artists than ever are taking advantage of the worldwide streaming boom, with data from the BPI showing 200 UK acts achieved over 200 million global audio streams in 2022<sup>7</sup>.

The UK music industry has long held a prominent position on the global stage, with its strong history of influential artists and iconic venues. Post COVID-19, a renewed sense of adventure has captured the international travel market and our global presence has continued to thrive, attracting music enthusiasts from around the world to experience the diverse range of musical offerings the country has to offer.

Please see page 65 for a full list of references.

The decision to host ABBA Voyage in London highlights how the UK is seen as a serious place for a celebration of music. The immersive concert experience, featuring digital versions of the Swedish pop group, has seen fans from across the globe flocking to the UK to witness this unique and nostalgic event. ABBA Voyage serves as a testament to the UK's ability to host high-profile international shows and attract visitors who are passionate about music.

But it's not just concerts and festivals that attract international tourists to the UK. All over the world, people listen to music from UK artists and form ideas of what the country must look and feel like. This helps advertise the UK as a great place to visit, study or even live, far beyond what the statistics can capture. With UK artists in recent years estimated to have accounted for around one in 10 streams around the world<sup>8</sup>, the influence this has on music tourism and people's image of the UK is huge.

Challenges still exist on the international stage. Despite some of the fantastic studio options in the UK, the persistent struggles, including high business rates and lack of tax breaks, is causing some artists to leave for better serviced studios outside of the UK. Post-Brexit, EU touring has become more complex, with additional paperwork, costs and time added to a previously easy process. Obtaining US visas for UK artists

is increasingly challenging, limiting artist ability to perform in the United States a key, global market.

With Goldman Sachs estimating the global music market will grow from \$92bn in 2023 to \$151.4bn by 2030<sup>9</sup>, there is enormous potential for the UK's world-renowned music market to continue to flourish. But fast-developing new markets in Asia, Africa and South America mean we are facing increasing competition globally. If we are going to maintain our world-leading status in music, the industry needs continued support.

To address these challenges, UK Music continues to push for a Music Exports Office, to facilitate collaboration, advocacy, and information sharing. Continued support for successful initiatives including the PRS Foundation International Showcase Fund (ISF) and BPI-administered Music Export Growth Scheme (MEGS) is necessary to ensure sustained growth and international opportunities for UK musicians.



The Wreckers - Glyndebourne Festival 2022 | Glyndebourne Productions Ltd. Photo: Richard Hubert Smith ©

# Music Powerhouse Toolkit:

## A guide for towns, cities and regions

The UK has an ability to captivate audiences worldwide, but we must nurture the talent that supports its profile on a global scale, especially against an increasingly competitive market. Local music ecosystems are key to this as they are critical to the talent pipeline.

UK Music's 2022 Power of Music report documented the health and community benefits of music, highlighting how music can be a cost-effective and accessible tool to forge community and boost wellbeing. This is just the very start of the benefits.

A strong local music scene can bring new visitors and funds to an area. It can put places on the cultural map and encourage long-term growth. As this section of the report will show, local government, council, regions, and cities have the power to make it happen.

Music impacts a wide range of areas for local government – planning, licensing, regeneration, health, housing, arts and culture, sustainability, tourism, and economic growth, among others. By uncovering best practices in each and measuring how they impact each other, we can see that investment is only one part of a thriving music ecosystem. A robust policy framework with music incorporated into performance indicators is key.

Luckily, any city, town or place can capitalise on all the opportunities music can deliver. From our experience working around the UK with our partner the **Center for Music Ecosystems** here are four core lessons for local government, split into policy areas. These policy areas have direct links with the goals used at local government level to unlock funding opportunities. In each example we have outlined what could be implemented locally and where this has been done successfully.

We hope this helps towns, cities and regions become music powerhouses.

### What is the Center for Music Ecosystems?

The Center for Music Ecosystems is a non-profit organisation with a mission to conduct globally relevant research that demonstrates how music can be a catalyst for social change and support communities to use music to foster sustainable development at a local, national and global level.

Their mission is to ensure communities, policymakers and leaders use music to its fullest extent to make places better, through high quality research exploring how music impacts communities and how communities impact music.



Freddie McGregor performing at The Jam House, Birmingham | Nikki Riggon ©

### What is Agent of Change?

Since 2015, UK Music has been campaigning for the Agent of Change principle. This places the responsibility for mitigating impacts from existing noise-generating activities or uses on the proposed new noise-sensitive development. That could mean, for example, the developer of new flats takes responsibility for soundproofing to avoid the risk of new neighbours complaining about noise from a music venue.

In 2018, the Government included the Agent of Change principle in the revised National Planning Policy Framework (NPPF) to protect venues from developers. Planning authorities are required to consider the NPPF when determining applications. Campaigns to strengthen the Agent of Change principle in law continue.”

### RECOMMENDATION ONE:

Use data to ensure music is at the heart of planning and licensing policy.

### POLICY AREA:

Strategic Planning

To create sustainable, growth in communities it is integral that music features in long-term strategic planning consultations. Planning and licensing officials should work together to establish a joined-up decision-making process. This is important for both long-term strategic planning and scheme-by-scheme regeneration and should include, considering the impact music can have on the local high-street, community centres and building density.

One simple change to help create places where both residential developments and entertainment can co-exist is to include licensing colleagues in master planning discussions at the pre-application stage, which can reassert compliance with the Agent of Change provision in the National Planning Policy Framework (NPPF).<sup>10</sup>

Key to this process is good data. Local leaders need strong data, so they know they are making the best, most accurate decisions possible, based on clear evidence.

### PLACE:

Cardiff

Please see page 65 for a full list of references.

This places licensing at the front end of the planning process, which can reduce unanticipated burdens later on, while fostering more dialogue, community partnership and protection of grassroots music venues and spaces.

The city has unveiled plans to hire a full-time music officer, a first for Wales, who will serve as a liaison to ensure music is represented across the city's wider local plan.

### WHAT CAN WE LEARN:

Cardiff Council has placed great importance on its music economy, which has increased scrutiny, but also created stronger partnerships.

But it began with a data baseline - to understand where everyone and everything was, how much it was worth, how it fit together and who needed to be at the table so collective decisions could be made.

While the pandemic and financial circumstances continue to challenge progress, the city continues to take music and culture as seriously as any other sector, and with it, can better manage growth, convene parties and build partnerships.

### HOW CAN YOU MAKE THIS HAPPEN?

1. The first step is to commission or deliver a music audit. This is the data baseline that's needed to better understand the role of music and the associated night-time economy across the wider plan. A council representative must then lead the audit and be responsible for its comprehensiveness. The data is best presented in the same manner as all other datasets.
2. Next, a framework can be developed where the cabinet members for planning and licensing agree to collaborate intentionally to ensure any scheme brought forward involving both portfolios is assessed by licensing in the pre-application stage, and that, where required, the data from the music audit is incorporated.
3. Following on, a music board or commission can help steward the process or update the data. To learn more, read the Cardiff Music Strategy.<sup>13</sup>

### RECOMMENDATION TWO:

Regenerate empty spaces as hubs for music, culture and community.

### POLICY AREA:

High Streets and Towns and Wider Regeneration

Creating an inventory of music spaces, places and businesses, plus empty premises that could be used for music and culture, can help match providers with needed space or regenerate disused or empty stock. Making it easy and safe to access space responsively through an inventory or register can speed up approvals and increase the number of visitors to a town or city.

Also, this mapping can be overlaid on wider land-use planning assessments to better highlight cultural deserts and areas of need.

### PLACE:

Sunderland and Southwark, South London

### WHAT HAPPENED:

Across the UK, councils are struggling with reimagining empty department stores.<sup>14</sup>

In Sunderland a model emerged that all communities could adopt. In 2021, the council-owned Binns Department Store was converted into a music-led creative hub by local music shop, record label and social enterprise, Pop Recs.<sup>15</sup>

The complex includes a skills hub for the wider creative arts, a cafe and a music venue. The £1m transformation was part of Sunderland's Historic High Streets Heritage Action Zone,<sup>16</sup> to repurpose existing stock for community benefit.

Further culture-led redevelopment has occurred, including creative co-working and the reopening of The Fire Station,<sup>17</sup> voted one of the UK's best new venues.

This is all supported by local, intentional music and cultural policy. Sunderland maintains a robust music, arts, and culture office, which brings together stakeholders to help populate spaces, address gaps, and measure success and was instrumental in identifying sources of funding - most tangential to music and culture - with investment opportunities, such as Pop Recs.

In Southwark, a register of empty and available spaces and places for arts, music and culture are maintained, complete with relevant info for a prospective tenant or arts organisation - including cost, space, time available and other terms.<sup>18</sup> This Cultural Spaces register has since been adopted across the Greater London Authority, with the GLA offering its own across Greater London.<sup>19</sup>

### WHAT CAN WE LEARN:

A joined-up approach that explored how to redevelop disused council-owned assets was deployed by the local authority through a culture and music-first approach.

This enabled local music and cultural professionals to address a number of challenges at once - including animating the high street, increasing footfall, combating antisocial behaviour in empty town centres, house more rate paying businesses and improve public perception and talent retention.

### HOW CAN YOU MAKE THIS HAPPEN?

1. The first step is to map all available space that could be used for music and culture and make it available to community members online. Ensuring it is updated regularly is key, to avoid disappointment or mixed messaging, such as a property being shown as available that isn't.
2. At the same time, creating a register of funding and investment to regenerate buildings and improve high streets and towns, can help match ideas and organisations with space - and the investment to regenerate - as Sunderland's arts and culture work shows. The money to support Binns regeneration in Sunderland was not earmarked for music specifically, it was part of a pot dedicated to preserving heritage.

Connecting these dots does not need to be over-complicated. Councils instruct agents and other consultants to support retail and commercial regeneration - the same can be applied for music, arts and culture.

### RECOMMENDATION THREE:

Enshrine music and the local community in regeneration and partnership plans.

### POLICY AREA:

Skills, education and community development

The best time to incorporate music and culture into wider civic priorities is when discussing opportunities with investors, from early-stage conversation all the way to the bidding process to acquire land. Music and culture can be a key tool to market new areas to potential buyers.

However, this needs to be front and centre from the start, in bidding assessment and planning negotiations. Decisions made at the front end should ensure provision for a community recording studio or cultural workspace are built into the scheme rather than bolted on. This could be managed through a Section 106 agreement (where planning obligations become legal obligations) or through tailored partnerships.

A joined-up approach that recognises and protects existing arts and culture actors can create more specific and substantive agreements, which include music provision and foster better, more community-friendly investment.

But this isn't necessarily a one size fits all approach – local decisions need to be made with the local community in mind.

### PLACE:

Bradford and London City Island

### WHAT HAPPENED:

As part of Bradford's wider town and city-centre regeneration strategy and its awarding of UK City of Culture status in 2025, it has taken a deliberate approach to incorporate music into its economic, social, and community strategy. 'Culture is our Plan' is Bradford's 10-year strategy that ties the prioritisation of culture to their economic growth. With clear targets and big ambitions, the aim is to prove the positive impact of culture in everyone's lives. It helps to provide a strong blueprint for other cities looking for guidance on where to start.

Music has intentionally featured heavily in all of this. Bradford Live, a 4,000-capacity theatre, is due to open in 2024 as part of the City Park redevelopment, which includes housing, community-focused retail and a new public realm. Additionally, the city has delivered a night-time economy roadmap focused on

#### What are Section 106 agreements?

Section 106 (S106) agreements are legal agreements between Local Authorities and developers; these are linked to planning permissions and can also be known as planning obligations.

Section 106 agreements are drafted when it is considered that a development will have significant impacts on the local area that cannot be moderated by means of conditions attached to a planning decision.

expanding the city's music and cultural offering tailored to those who use it by avoiding relying on alcohol, pubs and bars.

Another example, London City Island, has been transformed in recent years from a disused industrial site into a thriving, fine-grained, arts inspired riverside community. The area has been the permanent home of the English National Ballet (ENB) since 2018. Key to this development is the balance between residential, retail and workspaces alongside fresh cultural institutions that have brought a range of independent makers and artists to the Island.

A major factor in the success of this project was the partnership between property developer Ballymore, Glenn Howells Architects and the ENB, who ensured the space was tailored and permeable to the unique needs of the ENB and the firm belief from the developers in bringing art to a new audience. In doing so they have found they are able to enhance unit values in areas when there is cultural space in the development. This highlights the cultural, social and commercial benefit to developing these sorts of partnership.

### WHAT CAN WE LEARN:

These examples highlight the importance of a cohesive approach. From creating a diverse night-time economy offer, to redeveloping an iconic building or expanding and diversifying cultural opportunities, music, art and culture should be a core tenet for any long-term growth

#### What is an LEP?

Local Enterprise Partnerships (LEPs) are business led partnerships between local authorities and local private sector businesses. They play a central role in determining local economic priorities and undertaking activities to drive economic growth and job creation, improve infrastructure, and raise workforce skills within the local area. LEP boards are led by a business Chair and board members are local leaders of industry (including SMEs), educational institutions and the public sector.

plan. In Bradford, this proved them to be the most attractive candidate as the UK's 2025 City of Culture. While London City Island has won prestigious awards, including best new place to live at the London planning awards.

### HOW CAN YOU MAKE THIS HAPPEN?

Partnerships and community involvement are key. In Bradford, its strategic lead for culture and policy has developed a framework to engage both with other policymakers and the wider community, through a series of public events related to what kinds of culture, music and nighttime economy Bradford wants.

Local authorities must also have the autonomy to allocate financial resources in line with their specific needs and priorities when for the benefit of the wider community. It's necessary to focus on a broader concept of infrastructure, encompassing not only essential public services like roads and schools but also cultural opportunities, like music. This notion aligns with the principles outlined in the 2022 Government Levelling Up white paper, which emphasised the importance of promoting cultural accessibility and inclusivity as integral components of regional development strategies.

#### RECOMMENDATION FOUR:

Create a music advisory commission with local business leaders, stakeholders and tourism boards.

#### POLICY AREA:

Economic development and tourism.

#### PLACE:

Liverpool, Cardiff, Sheffield, Manchester, and the West Midlands

Many communities across the UK have established music boards and commissions. We believe this can be further improved by ensuring representatives from ancillary organisations are included - LEPs, BIDs, tourism boards, NHS Trusts, and social enterprises. Setting up committees that align with local priorities - such as one dedicated to planning and another to LEP initiatives - can create stronger partnerships and better integrate the skills and economic benefit music and cultural businesses can deliver to the wider community.

#### WHAT HAPPENED:

Music boards allow for effective engagement with bodies outside their membership, such as local enterprise partnerships and tourism organisations.

While not all music boards contain members from local enterprise partnerships or tourism, it is actively engaged in discussions with those organisations. This benefitted the Music Board in Liverpool, where they ended up playing a significant role in winning the bid to host Eurovision\*.

Similar boards exist in Cardiff, Sheffield, Manchester and the West Midlands, with each serving different roles in fostering stronger engagement in the music industry but importantly, providing a framework for music to engage with the wider community. Liverpool, along with Birmingham and Manchester, has mapped local venues and music infrastructure, while in Sheffield the Board launched a hub to support local talent.<sup>20</sup> Each offers lessons that can be utilised in communities across the country.

#### What is a BID?

Business Improvement Districts (BID) are business led partnerships which are created through a ballot process to deliver additional services to local businesses.

They can be a powerful tool for directly involving local businesses in local activities and allow the business community and local authorities to work together to improve the local trading environment.

#### WHAT CAN WE LEARN:

A music board serves two functions. The first is to elevate the economic and social value of the local music industry. The second is to improve and expand the role of music across the community. There are many strong examples to take forward, from Liverpool's engagement in marketing the city to Cardiff and Manchester's role in strategic planning.

#### HOW CAN YOU MAKE THIS HAPPEN?

Start a Music Board. Engage representatives from your LEP, local health trust, BID, city council and arts organisations and set up a structured and formal framework where the board can advise those it needs to - such as a city or district council - while maintaining independence.

Select a few priority areas such as education, tourism or skills and outline the key policy discussions locally where music can play a positive role. Establish a simple charter and membership structure - and publish everything online that happens. No community is too small to take advantage of music and become more music friendly!

For those cities that already have a Music Board in place, think about what comes next. Goals around sustainability, transport and international reach may be part of the longer-term planning that comes with being a well-established Music Board. Share best practice with others and keep growing partnerships with new parts of the industry.

#### And finally...

Engage with the music industry to establish partnerships and spur local investment.

UK Music, alongside the Center for Music Ecosystems, can provide support, best practice examples, and a national network to ensure music is adding value to your local community plus supporting regeneration and development. If you would like to expand the benefits that music can bring locally - from events to education, regeneration to social inclusion and wellbeing, please get in touch.

\*Please see case study on page 24.

Please see page 65 for a full list of references.



Wet Leg performing at the BRIT Awards 2023 | JM Enternational - BPI ©



# Conclusion

This report has shown the UK's music tourism industry is a vibrant and thriving sector, attracting millions of visitors, for many different reasons, each year to every part of the UK. The country's rich musical heritage, diverse range of genres, and iconic music landmarks have solidified its position as a top destination for music enthusiasts from around the globe.

Here, There and Everywhere has explored the various facets of music tourism in the UK; through the numbers that visited concerts and festivals, and also through the commentary across studios, education institutes, social enterprises, music conferences and more. It has highlighted how the UK music industry has the power to generate substantial revenue and create employment opportunities, whilst also fostering cultural exchange, artistic appreciation, and community engagement across each and every city, town and region.

It has shown how the UK's festivals, live music venues, historical sites, and education institutes offer immersive experiences that you wouldn't find anywhere else. Better yet, the UK is able to cater to diverse tastes and interests, from dubstep and djent.

But challenges do remain. Competition from other countries is only set to get tougher. Increasing costs, supply chain issues, and

lingering losses caused by COVID-19 are likely to make things tough for artists, venues, festivals and studios for the foreseeable future. It is clear that continuous attention and proactive strategies are needed to maintain and enhance the appeal of music tourism in the UK.

As the industry evolves over the next decade, it is crucial for local authorities and regional leaders to collaborate and innovate, which our music powerhouse toolkit will help to do. This will help the UK further strengthen its position as a premier music tourism destination and ensure all regions have an enduring legacy in the global music landscape.

2022 marked an important year for music tourism in the UK as we emerged from the shadows of the COVID-19 pandemic. The return of live music brought joy and excitement to fans worldwide.

Let's keep spreading the joy - as The Beatles put it on their legendary Revolver album - here, there and everywhere.

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The full methodology can be found on the UK Music website. In this report we use a slightly updated methodology, allowing UK Music to better understand the full scope of the industry's impact. As this is slightly different from the methodology used in previous years, we are not able to do comparisons on datasets.

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This report was written by **Hannah McLennan** and designed by **Beatriz Ribeiro** at UK Music.

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This report on the music industry has been created on behalf of UK Music and its members to highlight the contribution of the music industry to the UK economy.

UK Music is the collective voice of the UK's world-leading music industry. We represent all sectors of our industry - bringing them together to collaborate, campaign, and champion music. The members of UK Music are: AIM, BPI, FAC, The Ivors Academy, MMF, MPA, MPG, MU, PPL, *PRS for Music*. UK Music also has an informal association with LIVE (Live music Industry Venues & Entertainment).

