GREATER MANCHESTER
MUSIC REVIEW 2019
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FOREWORD

Greater Manchester has produced some of the finest music talents the world has ever known – an astonishing back catalogue, seen over many decades, with creative legends from almost every genre.

So the challenge now is this: how do we build on that heritage to ensure Greater Manchester has even greater music success in the future? And to do that we need to make sure that the region’s music industry is as strong as possible and that it is accessible to people from every background.

No one understands that more than Mayor Andy Burnham. He really gets just how vital music is to the culture and the economy of the region. Music brings enjoyment to millions and, as our flagship Measuring Music report revealed, it contributes £4.5billion to the UK economy.

However, as our Talent Pipeline report last year showed, there is so much more that we need to do – whether that’s to protect grassroots venues and promote new rehearsal spaces, or to ensure that every young person has the chance of trying a career, regardless of whether they’ve got access to the ‘Bank of Mum and Dad’.

That’s why UK Music is delighted to collaborate with Andy Burnham and the Greater Manchester Combined Authority.

This important report outlines a number of key recommendations that map out how we can achieve future success in Greater Manchester. It follows an extensive consultation with the public, those involved in the music industry and nighttime economy, local authorities and other key local stakeholders.

Our review looked at issues ranging from how we can improve the experience of audiences and musicians at venues and festivals in Greater Manchester to the need to implement better planning laws business rate relief for music spaces.

The review also established areas where we can work together on issues like developing platforms to bring on emerging talent to the need for improved transport links to boost the nighttime economy.

One of our key recommendations is that there should be a new Music Board for Greater Manchester – which I very much hope the Mayor will take forward.

A new Music Board would get all the right people around the same table. It’s worked in other cities around the world and it will really make a big difference to the city region in and around Manchester.

I hope you enjoy this report and will support its recommendations and our future work.

Working together with Andy Burnham and the Greater Manchester Combined Authority, I am confident that UK Music and all our members and partners can help ensure that Greater Manchester’s future as a global leader in music can be every bit as good, if not even better, than its fabulously proud past.
INTRODUCTION

At the time I didn’t realise how lucky I was.

To be 19-years-old in the summer of 1989, and doing my first job on Portland Street with Piccadilly Records and Affleck’s just around the corner, was, looking back, the very definition of being in the right place at the right time.

In that moment, Manchester was the undisputed capital of music and much else besides. It felt like we were the epicentre of everything. Things were happening everywhere you looked and I was busy lapping all of it up. I can remember thinking that perhaps it was always going to be like this.

Of course, there was an element of the stars aligning at that particular time. But let’s get this right - it wasn’t all luck.

Manchester had made its own luck and created that moment in the sun. It was down to a generation of like-minded people, led by Tony Wilson, who believed in the place, its young talent, and had been working for at least a decade to give it a platform.

It is hard to believe that this August marks 30 years since I trekked up the M6 to Blackpool with what felt like half of Manchester to watch The Stone Roses at the Empress Ballroom. The best way I can think of marking that milestone is to go back to what Manchester’s musical pioneers did so well in the past and work with others to apply those lessons afresh to our modern times.

We need to start by recognising that the music industry has changed since 1989. It is quite a lot harder now than it was then for new talent to get noticed and to break through. Gone are the days of watching Granada Reports on a Friday evening and hearing Tony Wilson, having finished reading the headlines, say: “And, to play us out, here’s Northside …”

We need to find new ways of doing the same and giving today’s Mancunian talent a stage and a spotlight in which to shine.

It was this impulse which led me to ask UK Music to undertake this independent review. It was time to take an honest look at ourselves: to understand our strengths, what works well for our artists and audiences; but also to be aware of our weaknesses and what more we can do to stay ahead of the game and make Greater Manchester an even better place to make and enjoy music.

Manchester remains one of the world’s great musical cities and the recommendations in this report will help us protect what makes it special. They will help us ensure that everyone in Greater Manchester has the opportunity to celebrate the music that is part of their own identity and background.

There can be many barriers in the way of people feeling part of the music industry or scene, linked to finance, gender, ethnicity and disability. Imagine being offered a dream opportunity to play a festival but having to turn it down because the venue is physically inaccessible to you.

It is my job, and that of the Greater Manchester Combined Authority, to remove these barriers in front of our people and let the talent we have proclaim itself to the world. So we will consider all of these recommendations and work to implement them, with support from UK Music and other national partners.

One thing I have already decided to do, though, is to create a new platform so that Manchester’s talent of today can get noticed. So, this summer, alongside the Manchester International Festival, we will hold the first Distractions. This is intended to provide a space for debate about trends in our creative and music industries, building on the legacy of In
the City. But it will also throw a spotlight on the coming talent from across our city. If it helps and people like it, we will look to build it in the years to come.

I would like to thank all of the members of the review panel for the passion they have put into this and everyone who has contributed their thoughts and taken part in our public surveys.

When you live in a city with a past as glorious as ours, complacency is an enemy always to guard against. We cannot trade on past glories. It is time for the new. Let's get to work to bring it on.
## Greater Manchester in Numbers

<table>
<thead>
<tr>
<th>Category</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total live music audience in Greater Manchester in 2017</td>
<td>1.9 MILLION</td>
</tr>
<tr>
<td>Number of music tourists in Greater Manchester in 2017</td>
<td>703,000</td>
</tr>
<tr>
<td>Total local attendance of Greater Manchester residents at music events in 2017</td>
<td>1.2 MILLION</td>
</tr>
<tr>
<td>Total direct and indirect spend generated by music tourism in Greater Manchester</td>
<td>£169 MILLION</td>
</tr>
<tr>
<td>Proportion of live music audiences in Greater Manchester that are music tourists</td>
<td>37%</td>
</tr>
<tr>
<td>Total live music attendance in Manchester in 2017</td>
<td>1.7 MILLION</td>
</tr>
</tbody>
</table>

### Direct Tourism Numbers in Proportion to the Rest of the UK

<table>
<thead>
<tr>
<th>Category</th>
<th>Figure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spending</td>
<td>£109 MILLION</td>
</tr>
<tr>
<td>GVA</td>
<td>£52 MILLION</td>
</tr>
<tr>
<td>Employment</td>
<td>1,395</td>
</tr>
</tbody>
</table>

**Note:**
- These figures on these pages are taken from 2017 and provides a baseline.
- 2017 saw the tragic attack on the Manchester Arena and its closure for several months. There were also fewer large-scale events across the city during 2017 as a result. This should be taken into account when making comparisons with published data in future years.
- All data collected only relates to live music-based events. Ticketing data which relates to other events in multi-purpose venues, such as sport and comedy shows, are not included.
- The ticketing data processed by UK Music and Oxford Economics aims to cover as many ticketing agents as possible but not all currently share data. The extent that these figures capture small local concerts for example may be conservative.
REGIONAL BREAKDOWN

MANCHESTER
£68.9 MILLION BOX OFFICE SPEND
1.7 MILLION ATTENDEES

NEIGHBOURING BOROUGHS
£9.3 MILLION BOX OFFICE SPEND
233,900 ATTENDEES

WIGAN
BOLTON
OLDHAM
BURY
SALFORD
TAMESIDE
TRAFFORD
ROCHDALE
STOCKPORT

MUSIC TOURISM

FESTIVALS
£1.9 MILLION BOX OFFICE SPEND
19,710 ATTENDEES

GRASSROOTS
£3.1 MILLION BOX OFFICE SPEND
189,600 ATTENDEES

ARENAS
£39.7 MILLION BOX OFFICE SPEND
748,140 ATTENDEES

OTHER (INC. PARKS)
£21.6 MILLION BOX OFFICE SPEND
736,690 ATTENDEES

STADIUMS
£11.9 MILLION BOX OFFICE SPEND
193,810 ATTENDEES
10 RECOMMENDATIONS

The Greater Manchester Music Review was launched on 22 June 2018. The review was led by UK Music, the umbrella body for the commercial music industry, for the Greater Manchester Combined Authority. UK Music has been supported by three chairs for the review: Inspiral Carpets legend Martyn Walsh, BPI chair Ged Doherty and Co-Director of Crisis Management LLP Karen Boardman. The review makes a number of recommendations to enhance Greater Manchester’s musical strengths. These recommendations have been informed by extensive consultation including three roundtables involving key music representatives from across Greater Manchester, as well as two public surveys.

The Greater Manchester Music Review recommends:

1. Setting up a new Music Board
2. Establishing a Talent Pipeline Fund
3. Establishing a Global Music City Region
4. Protecting Grassroots Venues through Agent of Change
5. Incentivise Businesses with Discounted Rates
6. Coordinate Music Education Services
7. Opportunities for Emerging Artists
8. Inclusive Networking
9. Reaching Out to Every Corner of the City Region
10. Integrating Transport

1. SETTING UP A NEW MUSIC BOARD

A recurring theme of our roundtable events was the need for greater co-ordination and connectivity across the region’s music scene.

A key way of addressing this issue would be to establish a new Music Board which could co-ordinate strategy to support the music industry and venues, nurture future talent and act as focal point to boost growth and jobs in the sector.

The Board should include representatives from local authorities in key areas such as planning, the police, licensing and cultural development. It should also act as a conduit between the industry and funding bodies.

There are several examples of music boards and similar bodies playing a vital role in supporting local music scenes.

In San Francisco, the successful Entertainment Commission has the status of being a “statutory consultee” in planning disputes affecting music venues and can fight on their behalf.

In Seattle, the city music commission is a body of industry experts appointed to advise the music and film office on their work programme.

In London, a board has been developed around a series of key priorities and has played an important role in ensuring the city’s vibrant and diverse music scene is protected. It has helped successfully challenge policies that were seen to discriminate against certain musical genres. UK Music has already helped establish music boards in Sheffield and Liverpool to help with this advisory role.

In Greater Manchester, such a board would bring together key stakeholders to analyse the current state of music in the region and to advise and develop policy. It would also complement the work of Sacha Lord-Marchionne, Greater Manchester’s Night-Time Economy Adviser, as well initiating projects such as a mapping exercise of disabled access in venues.
2. ESTABLISHING A TALENT PIPELINE FUND

Encouraging people from all backgrounds to seek careers in the music industry is vital. However, many need support, particularly in the early stages of their careers and businesses. For many cities, a crucial starting point is to explore the local talent pipeline and assess talent retention and creation strategies. In our roundtable session held around this issue, class and income barriers to entering the music industry were discussed and strategic funding suggested as a possible solution.

Our consultations found that a new Talent Pipeline Fund offering grants of up to £5,000 in seed funding would be a lifeline to fledgling businesses and creative talent. The grants will go to those who have made a successful business case and met the criteria for the awards.

The Fund would be administered by the Cultural Steering Group in consultation with the Music Board. The grants could cover activities such as international tour support, recording studio time and start-up business costs. Collaboration with existing funding schemes, such as the PRS Foundation Momentum Fund, should be encouraged.

In Sweden, early career development for musicians is funded by grants, while Creative Victoria in Australia offers a funding programme as well as a dedicated emerging talent development fund. Such funding could be strategically employed throughout the Greater Manchester region to reach those areas currently culturally under-served and bring them together to develop strong talent.

3. ESTABLISHING A GLOBAL MUSIC CITY REGION

Greater Manchester has an opportunity to become a global music city region - attracting global interest in the talent it produces, whilst simultaneously being a destination for the international music industry.

The Combined Authority should explore the export potential of talent including funding showcase opportunities at events like SXSW in Austin or at more specialised events like WOMEX and MIDEM.

In Seattle the Music Office has created a programme at Sea-Tac International of live performances, licensed overhead music, web-radio on Wi-Fi and curated museum exhibits to promote the city’s musical output to visitors.

4. PROTECTING GRASSROOTS VENUES THROUGH AGENT OF CHANGE

Many smaller venues are struggling to survive in the face of spiralling rent and rate demands. Some also face challenges posed by redevelopment, contributing to the closure of around a third of small venues in a decade.

Night & Day, a historical venue where many famous Manchester bands began their careers, has been the subject of ongoing planning disputes around noise.

One way of protecting venues is to encourage the endorsement of the “Agent of Change” principle. It is now enshrined in law and gives venues much greater protection against developers because existing venues have to be considered when schemes are put forward.

The “Agent of Change” principle places the responsibility on the developer to ensure solutions are put in place to mitigate any concerns over, for example, noise from an existing music venue. Section 182 of the new National Planning Policy Framework (NPPF) establishes the principle and should be supported with immediate effect when considering current and future planning applications.

The Mayor of the Greater Manchester Combined Authority should write to all local authorities across Greater Manchester and ask them to fully implement the Agent of Change principle to give venues the protection they need.

There is a great chance to use Agent of Change to ensure that developers deliver noise reduction solutions to ensure that venues can live happily alongside new developments and to protect Greater Manchester’s iconic venues.
5. INCENTIVISE BUSINESSES WITH DISCOUNTED RATES

The rising costs of business rates and rents are a major hurdle to many fledgling businesses and entrepreneurs.

The 2017 revaluation of commercial business rates has resulted in a substantial rise in the rateable value of many music companies.

For example, the Manchester Arena rateable value increased by 80 per cent. The Eagle Inn in Salford increased by 82 per cent. The margins that many music businesses operate within means that even the slightest cost increase can create a significant challenge.

The UK Live Music Census found that 40 per cent of small venues thought increased business rates had an extreme, strong or moderate negative impact on their live music events in 2017.

Greater Manchester Combined Authority should look at implementing business rates relief for music spaces - including recording studios and music venues.

The relief would be modelled on the 2018 Autumn Budget and reduce business rates by a third for qualifying music spaces with a rateable value of up to £51,000.

6. COORDINATE MUSIC EDUCATION SERVICES

Around 50 per cent of children at independent schools get sustained music tuition, while the figure for state schools is a mere 15 per cent.

The decline of music education in schools is one the major issues facing our efforts to secure the music industry’s Talent Pipeline.

Our roundtable session held on talent development identified the importance of promoting music industry careers to young people. Participants also agreed that music education provision needs to be reviewed in Greater Manchester to ensure wider access to music.

Greater Manchester Combined Authority should coordinate music education services across the region.

This joined-up approach based on the principle of universal access would mean every young person in Greater Manchester should have access to music in education regardless of their background.

The local music industry could be invited to give masterclasses to young people and the combined authority could establish an amnesty of unused musical instruments, working with local music shops to repair instruments for use by aspiring musicians, as well as seeking sponsorship to provide more instruments.

The provision of education of less traditional forms of music should also be reviewed.

Rehearsal spaces, building on UK Music’s model scheme, can also be developed to give people the chance to get into a studio, rehearse and work with professionals.

The Combined Authority could assist with coordination between central Manchester’s Music Hub (One Education) and the other Hubs.

Applying these ideas in Greater Manchester would offer the chance to create a leading region of excellence for music education.

7. OPPORTUNITIES FOR EMERGING ARTISTS

Emerging artists need more help to develop their audiences and find the best platforms for their work.

A common theme from the music review was that there is a less traditional route to success in the music industry. Previously, musicians might have played certain venues such as The Russell Club or The Boardwalk, or appeared on a programme hosted by Tony Wilson.

More recently, through the growth of digital technology, it has become easier to find a platform. However, the volume of these services has meant it is harder to get noticed.

An option would be to develop platforms and support current showcases for emerging artists to help address this problem. This could be done by promoting existing events or providing support.

Portland, Oregon ran ‘Listen Local’ which played new local music to callers phoning city hall. In Austin, the city council invites performers to open city council sessions and proclaims days in honour of performers.

The Nordic Playlist has been developed as a tool to promote emerging and new music from the Nordic nations supported by live gig events in Berlin, Vienna and London.

Greater Manchester Combined Authority could adopt some of these ideas and use them as a basis to support emerging talent and connect better with new and existing industry focused events.
8. INCLUSIVE NETWORKING

The importance of networking was a key theme that emerged in the roundtables and survey responses.

Many emerging artists, entrepreneurs and those that seek to work in the sector do not know where to go to get advice or make connections. In contrast to the music sector, the digital and tech sector in Greater Manchester is well provided for with ‘Meet Up’ style events where organisations offer networking events, advice, talks and sessions. Collaboration would ensure networking happens across the region, strengthening the music sector and wider ecosystem.

It may be possible to utilise space used for existing digital, creative and tech sector meet-ups for the music industry.

Many cities already have industry-led networking opportunities. In Newcastle the organisation Generator provides networking and training for the local industry. In Wales, the People's Republic of Cardiff run a regular networking meet up for musicians to meet music service providers. Both run independently from local authority support.

The Greater Manchester Combined Authority should work in collaboration with the local music industry to establish regular networking and meet up opportunities.

9. REACHING OUT TO EVERY CORNER OF THE CITY REGION

This report underlines a great deal of potential in areas such as Wigan and Stockport to develop their own music industries.

Throughout the process of developing the music review, it was apparent many people involved in the music sector were not aware of the scale and breadth of the Greater Manchester music scene, often staying within their own local network.

This is problematic for those entering the music industry who do not have an established network.

The Greater Manchester Combined Authority should work with the local music industry to map all music activities across Greater Manchester to actively support them.

In the state of Georgia, the Georgia Music Partners commissioned an economic impact study of the music industry leading to investment reforms.

Creative Cardiff carried out a mapping of the city’s creative economy with support of the council.

Mapping all of the venues, labels, recording studios, and radio stations across the conurbation and making the information easily available would ensure the scale of the industry is fully understood. This will also assist with diversity and equality of opportunity.

Greater Manchester can draw upon its varied academic and industrial expertise to fully map a musical landscape to which policymakers could respond.

10. INTEGRATING TRANSPORT

The Combined Authority region covers 10 local authorities. This raises challenges over transport connectivity, particularly musicians and audiences attending events at night when services are less frequent.

Musicians often face problems loading and unloading at venues. Loading schemes where signs are put up so that musicians can load in/out in front of venues, rehearsal spaces and studios should be considered.

Such as scheme is run in Seattle by the city council. This concept has also been developed in the cities of Hamilton in Canada, in Melbourne, and Austin.

Incentives for increased use of public transport should include the particular nature of the nighttime economy and ensure access for people living outside urban hubs.

Manchester Airport could explore such ideas to give visitors a clear sense of the cultural identity of the region.

By encouraging and incentivising public transport use, there is decreased congestion and a lower environmental impact. Many festivals such as Glastonbury and Kendal Calling will offer travel tickets packages at a reduced price. This would reduce the number of cars in the city and town centres during large-scale events. By reviewing the region’s transport infrastructure, a positive impact can be generated to allow the growth and development of music in Greater Manchester.

Transport for Greater Manchester should integrate the music industry’s needs into its 2020-2025 transport delivery plan.
As part of this review the Greater Manchester Combined Authority conducted two consultations in the form of surveys to ascertain the opinions and views of those who work in the Manchester music community. This helped us to identify the challenges within the sector in Greater Manchester.

179 respondents gave up their time to answer the consultation which ran from 22nd August 2018 to 28th September 2018 with participants from within all local authorities making up Greater Manchester.

54 per cent of respondents had a primary role as a Musician with over 10 per cent coming from backgrounds of working at a Label, Promotion or in a technical capacity within the industry. The second largest group (‘Other’) consisted of those within the industry who have multiple roles. These vary from being both a Producer and a Journalist or being a Tour Manager whilst also working as a Festival Agent. 28 per cent are able to earn a full time living from working in music in Greater Manchester, with 47.9 per cent who were able to earn some money working in Music.

Where in Greater Manchester are you based?

- Wigan 5.03%
- Bolton 7.26%
- Bury 5.59%
- Salford 10.61%
- Trafford 7.82%
- Not answered 1.68%
- Rochdale 4.47%
- Manchester 40.22%
- Oldham 3.35%
- Tameside 4.47%
- Stockport 9.5%

Most respondents felt that the main reason why the Greater Manchester region does well is due to its vast range of music venues.
This allows the area to accommodate audiences, from the grassroots capacity venues of 50 people up to large arenas hosting over 60 thousand. Thus serving Musicians that are in different stages of their career level.

‘The live sector remains strong as artists of every level, from start ups to world renowned frequent the venues in and around Greater Manchester on a nightly basis.’ - From a survey respondent.

Regarding the relationship with London, 56 per cent surveyed felt that there are existing challenges to being a musician or running a music business outside of London. These issues include investment barriers and awareness of talent. The national press is heavily focused on London when reviewing talent.

‘Manchester lacks the ability to nurture talent unless they are already established.’- From a survey respondent.

Some respondents pointed out that there should be more opportunities to network between the London and Greater Manchester such as collaboration and sharing of knowledge and projects specifically with education and financial support (bursaries) for bands starting out in Greater Manchester.

65 per cent of respondents still believe that there are opportunities to being a musician or running a music business outside of London. These include the retention of talent staying in Greater Manchester due to London being overcrowded, the cost of living in Greater Manchester is lower than the capital and there are more smaller venues to play in. With the introduction of the new Media City in Salford Quays there is potential to have a more regional focus on the industry.

Many survey respondents suggested improvements including; the extension of licenses for venues to accommodate longer opening hours, initiatives or schemes for talent to be showcased via the national, and regional, media and more funding. Many feel there is substantial lack of funding being provided to support music sector infrastructure. This has had an impact on the operation of community run venues. There is also a trickledown effect as many venues do not charge entrance fees and are therefore unable to properly remunerate performing talent.
AUDIENCE SURVEY

HOW OFTEN DO YOU WATCH LIVE MUSIC IN GREATER MANCHESTER?

- 50.60% More than once a month
- 38.55% More than once every six months
- 4.82% More than once a year
- 3.61% Rarely
- 1.21% Never
- 1.21% Not answered

*HOW DID YOU FIRST GET INTO MUSIC?

- School 28.92%
- Family 41.57%
- Friends 37.35%
- **Other 25.90%
- Not answered 3.01%

WHAT AREA OF MUSIC ARE YOU MOST INTERESTED IN?

- Rock 40.36%
- Dance / Electronic 10.24%
- Folk 7.83%
- Pop 7.83%
- Other 25.90%
- Classical 4.22%
- Jazz 2.41%
- Urban 1.20%

Note:
*Respondents were able to select multiple answers
**Includes Other exposure and Other experiences to music
When asked for their opinion on what changes they would like to see to support music in the region many respondents suggested more assistance for community radio stations, more family-friendly events and more options for people to be able to get home after gig.

Ideas to bundle or discount public transport, possibly included with ticket prices, were also put forward. Audiences would like to see fewer ticket touts at larger events, and a greater focus on emerging talent.

There was a feeling that Greater Manchester should nurture the talents that already exist in the region, hosting a multi-venue festival like Brightons’ Great Escape, which would give emerging acts from Greater Manchester opportunity to perform to new audiences.

The Greater Manchester Combined Authority conducted their second consultation survey between 12th November 2018 and 14th December 2018. 167 participants answered questions and provided their opinions of the state of the music scene in Greater Manchester.

The areas of music that are most popular include Rock 40 per cent followed, by Other 26 per cent and then Dance / Electronic 10 per cent. 30 per cent of participants currently played a musical instrument 65 per cent did not.

When asked what springs to mind when thinking of Greater Manchester many people commented that the area was vibrant, diverse and rich in talent. Overall there was a feeling of pride in great venues and a sense of the significant musical heritage and legacy.

51 per cent of respondents went to watch one or more live music events once a month and 38 per cent attended live events more than once a month. Along with the 1.7 Million locals attending music events this confirms that the Greater Manchester is a vibrant live music region. Unfortunately there are still issues around accessing gigs within the region. The cost of travel to some venues, particularly between other towns, compounded with the issue of getting home after hours is a challenge faced by the Greater Manchester audience. Parking is also a problem with many feeling that the cost in town centres are too high. There are also associated costs with attending an event, such as travel and parking, that can impact the affordability of live music for consumers.

Small venues such as Band on the Wall, Gorilla, Deaf Institute and The Soup Kitchen to the medium sized venues like Victoria Warehouse, Apollo, Bridgewater Hall and Albert Hall were amongst the favourites cited. Not just venues in the city centre were mentioned. The Eagle and The Golden Lion in Salford and The Old Courts in Wigan were among popular spots for intimate events for music. The popular Parklife and Manchester Jazz Festival are filled with well-known headliners but festivals such as Dot 2 Dot and Off The Record are where the diversity is met and there is hope that these will continue to grow.
The first roundtable took place on November 6th 2018 at the Royal Northern College of Music in Manchester and focused on business.

It was chaired by Karen Boardman (Crisis Management). The participants included Carol Isherwood (Shoosmiths), DJ and journalist Dave Haslam, Neil Claxton (Faith and Hope), Steven Wood (British Sound Project), Liam Walsh (AskMePR), Mike Purcell (MC Concrete Records), Gary McClaran (Sparkle Street), Steve Crowther (OJK), Brendan Williams (Low Four), Ian Stewart (Blueprint Studios), Karen Gabay (BBC Radio Manchester) and Rose Marley (Sharp Project).

They highlighted the importance of incentivising young people who want a career in the music industry to come to the Greater Manchester region.

The group discussed the relative lack of opportunity for musicians to showcase their work in Greater Manchester, as well as the prohibitive cost of public transport.

It was agreed that mapping the musical infrastructure of the city region would be very useful. The group noted a lack of integration between the local music industry and Media City in Salford.

The roundtable noted a lack of spaces set aside to allow local industry to come together to network and create. Another key concern was to ensure access and opportunity for all, and that small-scale seed investment would help individuals develop their careers. The group also agreed on the benefits of mentoring schemes to career development.

The group gave examples of best practice from music cities from around the world and how Greater Manchester can learn from this. For example, Austin, Texas has successfully re-branded itself as a music city without the level of music heritage that Greater Manchester has.

“\textit{It was a pleasure to chair the recent ’Music Business’ round table as part of the Greater Manchester Music Review. As a Music Manager working in the region for over 30 years, I understand the vital role that music infrastructure plays in any talent development process. We had a fantastic turn out including recording studies, PRs, Managers, DJs, lawyers and accountants. These experts all live and work in the Greater Manchester area and have given us invaluable feedback. I am excited about the next phase of this review where we will continue to build on this region’s remarkable music heritage.”}

Karen Boardman started her music career at the age of nineteen when she decided to make her constant attendance at The Hacienda official, persuading the management to give her a job. Over the next couple of years she helped look after a host of visiting bands including Depeche Mode, Echo and The Bunnymen and Madonna.

She eventually moved to London after landing a job at London Records working with the likes of Salt n Pepper, Voice of the Beehive and Fine Young Cannibals. This day to day dealing with artists led her to set up her own company, Rage Management. Over a 10 year period Karen worked alongside artists such as The Orb and Lamb. A full time move back to Manchester gave Karen the opportunity to project manage Manchester City Music Network, a chamber of commerce style organisation, giving advice, training and funding to over 700 music sector businesses in Greater Manchester.

Karen Boardman is currently a Director of Crisis Management LLP, an artist management company based in Manchester. Crisis represented and managed the careers of a number of artists including Karima Francis (Vertigo Records), Rae Morris (Atlantic Records) and JP Cooper (Island Records) to name a few.

She is also a Music Relationship Manager for Arts Council England.
ROUNDTABLE REPORT

TALENT PIPELINE

The second roundtable took place on 7th November 2018 at the Old Courts in Wigan and centred on talent development. It was chaired by Ged Doherty (Chair, BPI). Participants included local Wigan MP Lisa Nandy, Peter Wadsworth (Strawberry Studios historian), Carolyn Baxendale (Bolton Music Service), Tim France (Salford University), Damian Morgan (BIMM), Alison Surtees (Manchester Digital Music Archive), Kate Lowe (Brighter Sounds), Linda Merrick (RNCM), Debra King (Brighter Sounds) and Olga FitzRoy (Music Producers’ Guild).

The roundtable discussed the benefits of seed funding to create more career opportunities for young people trying to establish themselves in the music industry.

The group noted that certain musical genres were underrepresented in the local region and that seed funding which was quick to access and easy to apply for could help to overcome a class/income barrier to entering the industry.

The roundtable considered who would be the gatekeepers to the seed funding and how recipients could potentially contribute to the local music industry to provide a strong music eco-system. Early intervention is key and the roundtable suggested that more needed to be done in terms of careers advice in schools in order to raise awareness and demystify potential careers within the music industry.

The roundtable noted that a lot of the work going on around music education was not joined up and that more needed to be done to encourage individual schools to invest in the music education pathway.

The group advocated establishing a network of local knowledge and expertise and also noted that work needed to be done to improve gender diversity in the industry both locally and nationally.

“I was delighted to be asked to co-chair the talent pipeline roundtable on behalf of UK Music and Greater Manchester Combined Authority. Part of this meant hosting a roundtable in Wigan which took place on 7th November 2018. Around 20-25 people from all across the music industry in the North-West attended. There was a really positive conversation, and we were given many ideas about how UK Music can help with the Mayor’s plans for the music infrastructure of the Greater Manchester region.”

Ged Doherty is the Chairman of the BPI & BRIT Awards Ltd, one of the UK music industry’s leading trade bodies, whose members are responsible for more than 85 per cent of the recorded music sold or consumed across the country. The BPI represent over 300 independent labels, alongside industry heavyweights Sony, Warner, and Universal Music; and own and organize The Brit Awards, The Classic Brits, and The Mercury Music Prize.
ROUND TABLE REPORT
LIVE MUSIC

The third roundtable took place the 13th November 2018 at the Bakers Vaults in Stockport and focused on live music. It was chaired by Martyn Walsh of the Inspiral Carpets. Participants included Ben Robinson (From the Fields), Matt Wanstall (Musicians’ Union), local Stockport performer Mia Moon, Jane Randall (Marketing Manchester), John Summers (the Halle), Jay Taylor (Night and Day), Simon Webb (BBC Philharmonic) and Jeff Thompson (Un-Convention / Off Axis).

The meeting flagged it was important to map where local venues are based to gain a greater understanding of the local touring circuit.

The roundtable noted the lack of diversity of music on offer in venues outside of Manchester City Centre and how it was not reflective of the diverse cultures seen in local communities.

It was agreed that up and coming promoters should be supported in being more entrepreneurial bringing different genres of music to shows. The group flagged Agent of Change as a key principle which needed greater enforcement in order to help prevent the closure of local music venues.

Parking provision and public transport were cited by the group as creating a barrier to the live sector in the city region, with areas poorly served in the evening.

It was felt that more needed to be done to ensure that the live sector was a more inclusive place for women to come to work and perform. Music has been linked with venues selling alcohol and this blocks access to young people under the age of 18. Participants agreed that it was important to look to other platforms to promote the local music scene.

“The Live Music roundtable took place at The Baker’s Vaults in Stockport.

The session provided a fascinating insight into the multi-faceted live music industry, Greater Manchester has on offer.

Key themes were:
• The need for a more proactive take on business rate reduction for compliant music venues.
• Live music needs to be more flexible in its reach, with more new music stages at festivals needed.
• Live music being integrated into other cultural festivals such as food, performing arts etc.
• The need for more visible and accessible networks for emerging artists to share good practice re gig promoters, venues, fees, collaboration.
• Overall, there was an underlying theme that Greater Manchester needs to be immensely proud of its music heritage and also, it’s contemporary musical status but this needs to be built on and developed globally.”

Martyn Walsh is the bass player and songwriter for Inspiral Carpets, providing rhythmic foundations and lyrics for five studio albums, numerous Top 40 hit singles and a myriad of worldwide live shows.

He also composes music for computer games, radio & TV adverts, multimedia campaigns and has a remix portfolio including mixes for Irmin Schmidt and MFS Berlin.

Martyn has carved a niche as a successful Specialist Music Industry Consultant and spearheaded the New Deal for Musicians campaign in the early 2000s. He continues to offer advice, guidance and support to all levels of the music industry through regular nationwide seminars, workshops and consultations.

Currently, Martyn is the Creative Industries Guru in Residence for The British Library, based at Central Library Manchester.
### UK LIVE MUSIC NATIONAL NUMBERS

<table>
<thead>
<tr>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>29.1 MILLION</td>
<td>Total audience that attended live music events in the UK</td>
</tr>
<tr>
<td>25 MILLION</td>
<td>Total concert attendance in the UK</td>
</tr>
<tr>
<td>4 MILLION</td>
<td>Total festival attendance in the UK</td>
</tr>
<tr>
<td>18.2 MILLION</td>
<td>Local residents attended local music events in the UK</td>
</tr>
</tbody>
</table>

### MUSIC TOURISM NATIONAL NUMBERS

<table>
<thead>
<tr>
<th>Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>£4 BILLION</td>
<td>Total direct and indirect spend generated by music tourism in the UK</td>
</tr>
<tr>
<td>£2.5 BILLION</td>
<td>Amount spent directly by music tourists</td>
</tr>
<tr>
<td>10.9 MILLION</td>
<td>Music tourists</td>
</tr>
<tr>
<td>810,314</td>
<td>Overseas music tourists</td>
</tr>
<tr>
<td>44,896</td>
<td>Full-time jobs sustained by music tourism</td>
</tr>
<tr>
<td>10.1 MILLION</td>
<td>Domestic number of music tourists</td>
</tr>
</tbody>
</table>

**Note:**
Figures relate to 2017 do not include invoicing data received after the first week of February 2018. Figures from previous years includes invoicing data received up to the end of March of the following year.
This report for the Great Manchester Combined Authority is created on behalf of UK Music and its members to highlight the contribution of live music and music tourism to the Great Manchester Combined Authority economy.

This report is the second edition of a regional report based off of the new Metro City Regional structure.

UK Music is the umbrella organisation which represents the collective interests of the UK’s commercial music industry - from artists, musicians, songwriters and composers, to record labels, music managers, music publishers, studio producers, music licensing organisations and the live music industry. The members of UK Music are: AIM, BPI, FAC, Ivors Academy, MMF, MPA, MPG, MU, PPL, PRS for Music and the Live Music Group.

The UK Live Music Group is made up of members of the Association for Electronic Music (AFEM), Association of Independent Festivals (AIF), Association of Festival Organisers (AFO), Concert Promoters Association (CPA), Agents Association (AAGB), International Live Music Conference (ILMC), National Arenas Association (NAA), Production Services Association (PSA) and Music Venue Trust (MVT) with contributions from PRS Foundation, MU, MMF, FAC and BPI.
ACKNOWLEDGEMENTS

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A wide range of individuals and organisations that have provided datasets essential to this analysis of Greater Manchester and the UK as a whole. These include:

• AEG Live
• Arts & Festivals Management
• The Association of Independent Festivals
• AXS
• BBC Music
• Live Nation
• Music Venue Trust
• National Arenas Association
• PRS for Music
• See Tickets
• Ticket Factory
• Ticketmaster
• We Got Tickets
• Greater Manchester Combined Authority

We are grateful to all venues, festivals and other businesses featured in this report for sharing information and pictures. Additional thanks to all of our membership organisations for their support and help with this report.

The economic analysis was carried out by Oxford Economics and a methodological statement is to be found on the UK Music website. The Musicians & Business Survey and the Audience Survey was conducted by The Greater Manchester Combined Authority.

The project is managed by Natalie Williams, Head of Research at UK Music.

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