WISH YOU WERE HERE

LIVERPOOL CITY REGION EDITION

The national headline data in this report has been updated. Please refer here for the updated data. Corresponding updated regional and local figures for this report are not however available.
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INTRODUCTION

This year marks the tenth anniversary since Liverpool was the European Capital of Culture. It’s also ten years since UK Music, the umbrella organisation representing every part of Britain’s music industry, was established.

So what better way to celebrate those landmarks than helping to set out a blueprint for the Liverpool City Region’s amazing music scene for the next decade and hopefully for many more years to come?

That’s what this report is all about. Everybody knows about Liverpool’s unrivalled musical past. But we wanted to answer this question: how important is music to Liverpool City Region today and in future?

Thanks to our research, we know that spending today by visitors to music events in the Liverpool City Region - covering Liverpool city centre as well as Sefton, Halton, Knowsley, St Helens and the Wirral - generates an astonishing £135 million a year for the local economy. And according to our latest figures, almost one million people poured into live music events in the region in 2016.

Two years ago, I was lucky enough to perform at the legendary Cavern Club. Our research confirms that the City of Liverpool has so much to offer when it comes to music. As well as the tourist spots on Mathew Street, there is the beautiful Liverpool Philharmonic Hall, the Echo Arena, hosting global superstars like Bob Dylan and Nile Rodgers, as well as the O2 Academy and the Liverpool Empire.

But there is so much more to the City Region than just the City itself. Both the Wirral and St Helens also generated over £1 million in box office spend, with Sefton not far off that too. Over 14,000 people went to gigs in Halton. Whilst we do not have data for Knowsley, its Music and Performing Arts Service is dedicated to providing young people fantastic musical opportunities.

Liverpool has already rightly achieved UNESCO ‘City of Music’ status. Just like Nashville, the home of country music in the United States, Liverpool has an amazing music heritage of which everyone is understandably proud. But today we need to join forces and work even harder to nurture the music scene in the Liverpool City Region and to protect it for future generations of music lovers.

That’s why I welcome BOP Consulting’s ‘Developing a Liverpool City of Music Strategy’ report and the positive determination of Mayor Joe Anderson, Liverpool City Council and ‘Culture Liverpool’ to support the local music scene which brings so much enjoyment to so many people and is critical to the local economy. Both that report and this ‘Wish You Were Here: Liverpool City Region Edition’ research provides the right context to consider how the music industry in Liverpool and the wider City Region can best be protected, supported and strengthened in the future.

The Liverpool City Region’s devolution deal recognises the need to place culture and creativity at the heart of a strategy to accelerate economic growth, improve skills and develop a distinctive offer for inward investment. This presents a huge new opportunity for music across the City Region. That’s why I strongly believe that, under the leadership of Metro Mayor Steve Rotheram, we need to set up a Music Board for the whole Liverpool City Region.

Taking inspiration from San Francisco’s Entertainment Commission and the London Music Board, a Music Board can work as well, if not even better, here in the new Liverpool City Region.

The London Music Board has succeeded in promoting more access to music education and rehearsal spaces. Importantly, the London Music Board for the whole Liverpool City Region if we had a Music Board. Plus we can do so much more - including enabling transport links for music fans to be improved, helping developing the right infrastructure for the music industry and promoting more access to music education and rehearsal spaces.

We could do all of that in the Liverpool City Region if we had a Music Board. Plus we can do so much more - including enabling transport links for music fans to be improved, helping developing the right infrastructure for the music industry and promoting more access to music education and rehearsal spaces.

Importantly, the Liverpool City Region Music Board would be community and industry-led. It would get all the right stakeholders around the table and be representative of every proud corner of the City Region. It would take forward the approach set out in ‘Developing a Liverpool City of Music Strategy’, providing opportunities for musicians to perform and music companies to grow.

Liverpool City Region is a very special part of the world in so many ways - and not least for its musical heritage and its fantastic music scene today. Together we can make sure that Liverpool is not only known right across the globe for its brilliant musical past, but that it continues to be a world-famous music destination for many years to come.

So let’s set ourselves this challenge: in future, like the Beatles did more than fifty years ago, can we help create an environment where four young people growing up somewhere in the Liverpool City Region get together to make music and go on to change the world? If we get things right, I don’t see why not.
FOREWORD

In an increasingly competitive world and globalised economy, there is an increasing pressure on cities and city regions to find a distinctive identity and niche – to cultivate difference.

Liverpool City Region therefore has an enormous advantage and edge based on our extraordinary cultural history and its inexhaustible capacity to create.

Music and Liverpool are synonymous. It’s the city that gave birth to the most important pop culture phenomenon of the 20th century and has provided more UK number 1 hits than anywhere else. It’s not only the prolific success of local musicians that has led to the city’s designation as a UNESCO World City of Music, but also the rich variety of influences and styles that have crafted a distinctive sound and spirit.

And of course this musical heritage is not confined to the boundaries of the city of Liverpool.

In truth artists from every part of our City Region have contributed to the lustre of Liverpool’s musical reputation. Music is part of a shared DNA that binds our city region together and underpins a common attitude and identity.

We have a yearning to make music, and from generation to generation, we have entertained, charmed, challenged and influenced the world.

One of my biggest ambitions as Metro Mayor is to harness the talent and creative energy of our people to ensure that it can thrive and prosper here. That’s the purpose and context of this report. How we use something that the world knows we are uniquely good at, to add unique value to our future economy.

The question is: how do we nurture and support musical talent, but also develop the skills and infrastructure we need to build a sustainable and successful local music industry in Liverpool City Region?

As the success of local publishing company Sentric testifies, the digitalisation of music makes geography less important and creates space for a more distributed, nimble and innovative industry. I want music to be an essential thread of our Fourth Industrial Revolution economy; it’s integral to who we are, so we need to ensure it is a fundamental component of what we will be in the future.

A HIVE OF CREATIVITY

It’s been interesting contributing to this report as I’ve just been reading some fascinating social media streams featuring highlights from the past 40 years in Liverpool when punk was in its stride.

Eric’s, the now famous Liverpool venue, would be hosting a wide genre of live bands all of whom went on to become the next big thing in the subsequent decade. To pick a few names from the archive listings, some are still touring today, Tom Robinson, XTC, Ultravox & Talking Heads.

This illustrates how important smaller venues are for emerging talent, they allow development, to flesh out material in front of a small paying audience, whose instant reaction will help shape the arrangements of the songs and the future live set of the band, gaining fans along the way.

Liverpool in the late 70s was a very different place. Many venues then had fewer issues with noise pollution. In fact, there were so many empty properties landlords actively encouraged use of these properties.

Fast forward to 2017/18 and the region is fast becoming the place to be with many property developers refurbishing Victorian warehouses and old industrial areas to fulfil the demand for high quality student accommodation along with new family homes for those relocating to the North West.

Even in the city’s Baltic Triangle, where my studio is based, there is pressure on some of the existing venues, so I am thrilled that the Agent of Change principle is now being adopted.

One of the many things that attracted me to the North West is the sheer volume of very talented and well trained musicians that are a result of the flourishing university system here.

For those who are either too young or don’t want to pursue the academic route, the LMF Academy, run by the Liverpool City Council, offers a most enriching program encouraging anybody across the whole Merseyside area to enter a competition.

So far, the entrants have been enormously diverse. Prizes include cash to purchase any musical or recording equipment and a year’s worth of mentoring by industry professionals, as well as a BBC Music introducing session that exposes their work to the widest possible audience that would be listening for emerging talent.

The Liverpool region also offers a diverse range of options for music tourism, for cutting edge brand new acts there is Sound City, or Psych Fest. If your taste is more mainstream then the entertainment options range from musicals at the Empire Theatre, touring world class acts at the Echo arena, through to the Liverpool Philharmonic whose orchestral season features a rich repertoire of musicians and conductors from around the world. This sits side by side with the pubs, clubs and tiny independent venues that Liverpool is known for. Walk down any street day or night you will hear live music blaring out!
**LIVERPOOL CITY REGION IN NUMBERS**

- **937,000**
  Total live music audience in Liverpool City Region in 2016

- **416,000**
  Number of music tourists in Liverpool City Region in 2016

- **520,000**
  Total local attendance of Liverpool City Region residents at music events in 2016

- **£135 MILLION**
  Total direct and indirect spend generated by music tourism in Liverpool City Region

- **44%**
  Proportion of live music audiences in Liverpool City Region that are music tourists

- **20,000**
  Number of overseas music tourists visiting Liverpool City Region

**LIVE EVENTS**

- **FESTIVALS**
  £23.3 MILLION BOX OFFICE SPEND
  237,000 ATTENDEES

- **ARENAS**
  £14.2 MILLION BOX OFFICE SPEND
  312,000 ATTENDEES

- **STADIUMS**
  £1.7 MILLION BOX OFFICE SPEND
  27,000 ATTENDEES

- **PARKS**
  £500,000 BOX OFFICE SPEND
  7,000 ATTENDEES

- **OTHER**
  £5.6 MILLION BOX OFFICE SPEND
  200,000 ATTENDEES

- **GRASSROOTS**
  £3.2 MILLION BOX OFFICE SPEND
  155,000 ATTENDEES

**REGIONAL BREAKDOWN**

- **SEFTON**
  £929,000 BOX OFFICE SPEND
  22,834 ATTENDEES

- **WIRRAL**
  £1.2 MILLION BOX OFFICE SPEND
  40,498 ATTENDEES

- **LIVERPOOL**
  £44.7 MILLION BOX OFFICE SPEND
  833,020 ATTENDEES

- **ST. HELENS**
  £1.2 MILLION BOX OFFICE SPEND
  25,460 ATTENDEES

- **HALTON**
  £313,000 BOX OFFICE SPEND
  14,976 ATTENDEES

**LIVERPOOL CITY REGION TOURISM NUMBERS IN PROPORTION TO THE REST OF THE UK**

- **Spending**
  3.3%
  £135 MILLION

- **Attendance**
  3.0%
  937,000

- **Employment**
  3.6%
  1,701

*Using the current methodology to produce Wish You Were Here – Liverpool City Region edition no data was available for Knowsley
NUMBERS IN CONTEXT

UK Music is committed to initiatives which enhance understanding of our globally successful music industry. This is achieved by the gathering of strong data and robust evidence. We then present the data in reports, such as Wish You Were Here, to enable policy makers to make informed decisions to support the continued growth of our sector.

Our reports are used by the Government, Parliament, academics, students and industry. They also attract national media coverage.

First published in 2013, Wish You Were Here annually shines the light on the contribution of music tourism to the UK economy. These reports have demonstrated that UK spending attributed to music tourism has grown by a massive 81% over a four-year period.

To produce Wish You Were Here, UK Music annually gathers an enormous amount of data relating to tickets purchased for concerts and festivals. This is kindly supplied by promoters, ticket agents and venues from across the UK.

The data is then analysed by our partners at Oxford Economics. They produce a model that allows us to measure live music attendance at a local and tourist level, as well as spending and box office figures.

Based on headline data for our Wish You Were Here 2017 report, Oxford Economics have been able to disaggregate box office data for live music events across the Liverpool City Region.

This has revealed that over £48 million was spent on tickets alone for live music events across the City Region. Events such as Creamfields, the Liverpool International Music Festival, Africa Oye and Sound City each attract tens of thousands of music fans.

We can also reveal that direct spending from music tourists was £66 million at festivals and £32 million while attending concerts, further underlining why music tourism is such a vital part of the City Region economy.

“Wish You Were Here – Liverpool City Region Edition” is the first ever music industry report dedicated to analysing music activity in a combined authority area. We recognise the potential that this new system of devolved government presents to growing regional music industries and increasing productivity. This report will support that potential.
Ask anyone to name the world’s most important music cities, and Liverpool would be jockeying for position among the top spots. The city’s musical history is rich and its exports are numerous – with particular mention going to a certain quartet – but it’s more than that. Still today, music is simply in the air here.

It was that which inspired us to create Sound City in 2008. With the Liverpool City Region as the base, we wanted to hold a celebration of the North as a musical powerhouse. And, perhaps more importantly, we wanted to create a platform for the best new music – not just from northern England but all over the world. We wanted to champion exciting musicians and tell them that they could develop their craft and earn a living from their art without necessarily having to move to the capital.

With a potential live audience reach of almost one million, the region’s live music scene is an attractive prospect for grassroots artists as we see more and more coming to the area to cut their teeth in the region’s legendary music venues and festivals.

Ten years on, we have showcased thousands of bands and artists early in their careers, including acts that have gone on to rule the airwaves such as Ed Sheeran, Alt-J, Bastille, Skepta, Florence + The Machine and The 1975.

The Sound City team has created a hub for more than 200,000 music fans to gather from over 30 different countries.

In fact, this report has shown us that almost half of the live music audience is generated by music tourism. Therefore we need to do more to nurture this audience that is willing to travel for the unique live music experience that Liverpool offers.

Like many of the major music events hosted in the region, Sound City has also become a key network for music professionals.

When they’re not watching exciting young acts on one of our many stages, industry executives use Sound City as a place to discuss the shape of the business, meet with their peers, do deals and forge new relationships. In fact we’ve calculated that the number of contracts signed at Sound City over the years have a combined value of £19 million.

That’s a figure that we’re incredibly proud of, but it’s also testament to the continued creativity, influence and inspiration that can be found in the music scenes of Liverpool and its sister towns and cities of the North.
UK LIVE MUSIC 2016 IN NUMBERS

30.9 MILLION
Total audience that attended live music events in the UK in 2016

27 MILLION
Total concert attendance in the UK in 2016

3.9 MILLION
Total festival attendance in the UK in 2016

18.4 MILLION
Local residents attended local music events in the UK in 2016

MUSIC TOURISM IN NUMBERS 2016

£4 BILLION
Total direct and indirect spend generated by music tourism in the UK

£2.5 BILLION
Amount spent directly by music tourists

12.5 MILLION
Music tourists in 2016

823,000
Overseas music tourists in 2016

47,445
Full time jobs sustained by music tourism in 2016

£656 MILLION
Box office spend on tickets by music tourists in 2016

£4 BILLION
Total direct and indirect spend generated by music tourism in the UK

£2.5 BILLION
Amount spent directly by music tourists

12.5 MILLION
Music tourists in 2016

823,000
Overseas music tourists in 2016

47,445
Full time jobs sustained by music tourism in 2016

£656 MILLION
Box office spend on tickets by music tourists in 2016

£45 MILLION
Total box office spend on tickets by overseas music tourists in 2016

A GLOBAL MUSIC HUB

Liverpool has a deep and unique relationship with music. Few cities in the world have music at the heart of their city’s being, their people’s identity and their economy in the way Liverpool does. From Merseybeat to Cream, the grassroots music venues, clubs, cafés and hangouts of our city have given birth to movements that have shaped global pop culture, numerous times over. Liverpool’s live music culture is both our city’s DNA, and our gift to the world.

However, in the almost eight years we have been publishing Bido Lito! it seems the live music scene has been in a constant state of crisis. From noise abatement notices to planning decisions and rates disputes. This has led to a number of venues closing. Some have survived, but for how long?

Some of the challenges we face are unique to Liverpool. Many are not. In our 2017 report ‘Liverpool, Music City?’, published in partnership with Liverpool John Moores University, the music community cited venue closures and other issues such as noise complaints and developer power as the most consistent challenges to the city’s live music culture.

We called for Liverpool to adopt the Agent Of Change principle in local planning policy, so the recent Government move is welcome and could be a real catalyst for change. This move does, however, come lamentably late for some.

Though the positive strides around UK Music’s Agent Of Change campaign should be celebrated, there are still many other issues at play. There is a need for greater clarity around the overall ambitions for areas in which live music and club culture thrive; with a more detailed understanding of the role music venues play in the local ecology and the contexts needed for them to operate successfully. Whether it be in the Baltic Triangle, Ten Streets, Matthew Street, Ropewalks or anywhere else, music needs to be considered and prioritised across all areas of planning and policy.

In order to achieve this we need a new form of sector-led leadership around music policy in the city. And, reassuringly, ‘Liverpool, Music City?’ demonstrates an appetite for collaboration between the sector, the city region, city council and our universities. Future strategies around developing music in the city need to have the sector – at all levels, from the grassroots up – at the table.

With the welcome move towards the city’s first Music Strategy and the establishment of a sector-led Music Advisory Board, we are cautiously optimistic that the necessary political will is in place for this to become a reality. 2018 could be a watershed moment for the region, a year when we finally realise a vision to achieve what the rest of world has assumed for decades; that Liverpool really is a truly global music city.
Despite the closure of some key grassroots music venues in the past few years, the local music scene continues to thrive in both well-established and new venues. The government’s decision to include the “agent of change” principle in planning law is welcome news for a city like Liverpool, where city centre residential developments exist side by side with live music venues. For LIPA Music students and Liverpool bands, venues such as LEAF, EBGBs, Arts Club, Magnet, Jacaranda, Sound, Shipping Forecast, Studio 2, Zanzibar, Invisible Wind Factory, District, Moloko, 81 Renshaw, Kazimier Garden, Buyers Club, 24 Kitchen Street, Parr St Studios, Hus, 27 Club, Camp and Furnace, Blade Factory, and Drop the Dumbells, have played a crucial role in their development as performers and the continuation of Liverpool as a music city.

The 2ube is a weekly LIPA showcase gig and networking event and is also edited into a one hour TV show hosted by Janice Long and broadcast on Made in Liverpool TV via Freeview, Virgin and Sky providing LIPA and new bands from the region with a potential reach of millions each week across the North West and the UK. LIPA students access an audience through weekly in-house gigs nights, industry showcases and an annual two-week live streamed festival: 2ubeXtra.

According to Peter Guy from the Liverpool Echo and GIT (Getintothis) Awards, students from LIPA “have really integrated themselves with homegrown talent.” Local music journalist Emma Walsh notes: “Almost unnoticed, LIPA has woven itself into the fabric of the Liverpool music scene, bringing a fresh often more international taste to the Merseyside scene, resulting in one of the richest and Cosmopolitan musical landscapes in the UK.”

Celebrating 10 years of Liverpool music in 2017, GIT listed 101 artists and bands that have shaped Merseyside music, including many LIPA-associated artists and bands such as All We Are, Clean Cut Kid, Dan Croll, Eleanor Nelly, Natalie McCool, Pink Kink, Stealing Sheep, Tyler Mensah, and Trudy and the Romance.
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- PRS for Music
- Sage Gateshead
- See Tickets
- Symphony Hall, Birmingham
- Theatre Royal Concert Hall, Nottingham
- Ticket Factory
- Ticketmaster
- We Got Tickets

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We are especially grateful to Dr. Cédric Mesnage of Southampton Solent University for allowing us the use of his Research identifying music events happening in inner city Liverpool (Ref. Page 11).

Thank you to Jamm Studios, St. Helens for the kind permission to use the photograph on page 15.

Note – In the Liverpool City region flyers published November 2017 the tourism spending figure provided was for the Direct Spend only. In this report all figures include both Direct and indirect spending.

The analysis was carried out by Oxford Economics and a methodological statement is to be found on the UK Music website. The project is managed by Natalie Williams, Head of Research at UK Music.

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