bucks new university

MUSIC ACADEMIC PARTNERSHIP

UK MUSIC

Bucks New University & UK Music

2016 Report

BRISTOL LIVE MUSIC CENSUS REPORT

Photo by James Koch Photograph of Jay Wilcox playing at the Gallimaufry

CONTENTS

1. Foreword Jo Dipple, CEO UK Music 3
2. Foreword Teresa Moore, Bucks New University 4
3. Introduction & Report Findings 5
4. Report Findings 6
5. Results 8
6. Venue Case Study 1: The Fleece 9
7. Venue Case Study 2: The Exchange 10
8. Using the Principles of Agent of Change 10
9. Artist Case Study 1: Lady Nade – Nadine Gingell 11
10. Artist Case Study 2: Get The Blessing – Jake McMurchie 12
11. Artist Case Study 3: She Makes War – Laura Kidd 13
12. Artist Case Study 4: Upshot Management – Stephen Barnes 14
13. Conclusions 15
14. Methodology 16
15. Acknowledgements 19

About UK Music

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, BASCA, BPI, FAC, MMF, MPA, MPG, MU, PPL, PRS for Music and the Live Music Group.

About Bucks New University

In 2015 Bucks New University celebrated 20 years of providing a wide range of industry-acclaimed Music and Event Management courses preparing the next generation of industry professionals. The courses are delivered by a teaching team of established industry professionals with concert promotion, record company, artist management and production management backgrounds at a senior level.

Buckinghamshire New University has enjoyed a long and successful history since it was founded in 1891. The University now offers an extensive portfolio of courses spanning the creative and cultural industries, the management and information management sectors, and the public sector. It also offers services to industry including contract research, consultancy and the opportunity to employ graduates.

bucks.ac.uk

JO DIPPLE
Chief Executive Officer at UK Music

Government statistics revealed that the creative industries contributed £84.bn to the UK economy in 2014. It takes considerable research to fully understand the contribution British music makes to this figure. Our project with Bucks New University delves for the first time into a local music ecosystem, Bristol. It reveals what we might all assume, that Bristol supports a sizeable music economy.

For more than 40 years, Bristol has been home to some of the most influential and culturally relevant British musicians including Massive Attack, Robert Wyatt, Tricky, The Pop Group and two Mercury Music Prize winners in Portishead and Roni Size. Bristol's vibrant grassroots live music scene has been a bedrock of a rich musical lineage.

This research, however, also shows that 50% of Bristol venues are threatened by development and planning issues. Given the contribution to the wider economy, it has never been more important to address such issues critical to grassroots music. The success of Bristol's music scene is a barometer for the wider creative economy.

UK Music has campaigned heavily to Government for the introduction of an agent of change principle to planning laws, in order to prevent new developments sweeping our vital music infrastructure and incubating hubs for new talent out of existence.

One of our key objectives in setting up the Music Academic Partnership (MAP) was to help create a framework through which our academic partners could directly access music industry data and contacts, in order to help provide further research and analysis that will benefit the sector. This study is an excellent example of how new information can help inform our policy discussions with Government and local councils by showing the value and impact music has locally.

We hope that the Bristol census conducted by Bucks New University will help form a blueprint for future studies of music cities and towns throughout the UK. We will continue to make the case for Agent of Change to Government and also seek to better understand the vital ingredients for sustaining our vibrant live music scenes across the UK for years to come. We look forward to working with our members and MAP partners to do this.

Jo Dipple
March 2016

ukmusic.org

Photo courtesy of UK Music

TERESA MOORE

Head of Music and Event Management at Bucks New University

Lead Researcher

The plight of the small independent music venue has been highlighted in a number of reports recently including the Mayor's Music Venues Taskforce (2015) which focused on the situation in London. We know, however, from the work of the Music Venues Trust and others that London is not alone in the closure of an increasing number of live venues, many of them iconic. The purpose of this research was to take a focussed look at the situation in a city known for its live music scene outside of London. Bristol has a reputation as the home of great music and artists with well-known acts such as Massive Attack to upcoming artists such as those we profile in the artist case studies in this report. Many of these artists will have honed their craft in the small independent music venues which serve as the incubators for new talent.

What we found in Bristol was a vibrant music scene with many live music venues, home grown talent and audiences who enjoy live music. We found a local live music industry that makes a significant economic contribution to the city. What we also found, though, were venues under serious threat from the redevelopment of commercial property for the housing market. Our venue case studies highlight the problems they are facing.

I very much hope that this report will be used as evidence alongside other studies to demonstrate the importance of live music to the economic and cultural life of cities such as Bristol so that the UK's live music scene is valued and safeguarded for the future.

This research was carried out by our team at Bucks New University in partnership with UK Music through their Music Academic Partnership (MAP). I believe that MAP is a truly important and significant development in taking forward the relationship between academic institutions and the music industry. MAP is the conduit through which industry can harness the research capability of MAP member Universities. MAP Universities too can benefit hugely by engaging with the industry. They can give their staff and students the opportunity to undertake the research which is needed to fully understand the problems and help to develop solutions with the music industry

My thanks to UK Music and its Live Music Group for their support throughout this research.

Teresa Moore
March 2016

bucks.ac.uk

Photo courtesy of Dave Marriott

INTRODUCTION

On 22 October 2015, Bucks New University, supported by UK Music undertook a census of the live music ecosystem in Bristol. The Census was prompted by the increasing concern about the pressures faced by small grassroots music venues. We wanted to find out more about the health of live music in music cities outside of London. Recognising that little research has been carried out in individual cities our goals were:-

- to investigate one city looking at its live music ecosystem from the perspective of three key players the artist, the venue and the audience.
- to help create a blueprint that could be used to carry out similar research in other music cities.

We gathered data from the 23 venues hosting live music events on the night, alongside additional information gathered from venues, musicians and the local music industry networks helped provide us with clear insight into the value and importance of music to the city and some of the real threats to its future.

This report highlights key findings from the census followed by a series of case studies which provide a more detailed look at the Bristol music scene from the perspectives of music venues, artists, and artist management.

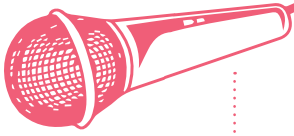
REPORT FINDINGS

Key findings revealed by the census were:

- Live music generated **£123m of revenue** for the Bristol economy last year (2015), equating to **£45m in GVA**
- Live music supported **927 FTE jobs** in Bristol in 2015
- The research identified **94 dedicated music venues** or venues where music is played across the city.
- Average capacity of the small venues taking part in the survey was **210**.
- **50%** of venues said they were affected by development, noise or planning issues.
- **41%** of the audience interviewed said that they attended **3** or more live music gigs per month.
- **32%** of the audience spent between **£20 and £50** on tickets per month
- Those who bought merchandise inside the venue spent an average **£18**.
- Nearly a quarter of the audience - **24%** - come from outside of the Bristol area and **travelled over 10 miles** to a music event in Bristol.
- **45%** said they had heard about the gig through word of mouth
- **72%** of musicians surveyed said they were playing more live gigs than the previous year.

REPORT FINDINGS

LIVE MUSIC GENERATED
£123M
OF REVENUE
FOR THE
BRISTOL ECONOMY LAST YEAR (2015)
EQUATING TO
£45 MILLION IN GVA



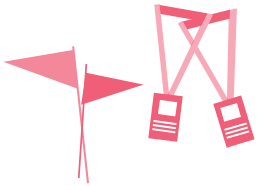
SUPPORTED
927 FTE JOBS
IN BRISTOL IN 2015

94 DEDICATED MUSIC VENUES OR VENUES WHERE MUSIC IS PLAYED ACROSS THE CITY

AVERAGE CAPACITY
OF THE SMALL VENUES
TAKING PART IN THE SURVEY

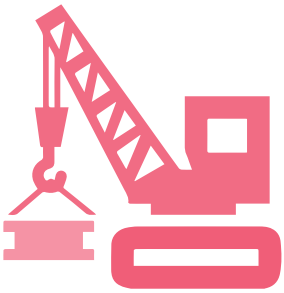
41% OF THE
AUDIENCE INTERVIEWED
SAID THAT THEY
ATTEND 3 OR MORE
LIVE MUSIC GIGS PER MONTH

32%
OF THE
AUDIENCE
SPENT BETWEEN
£20 AND £50
ON TICKETS
PER MONTH



THOSE WHO BOUGHT MERCHANDISE ON THE NIGHT SPENT **AN AVERAGE OF £18**

45% **SAID THEY HAD HEARD ABOUT THE GIG THROUGH WORD OF MOUTH**



72% OF MUSICIANS SURVEYED SAID THEY WERE PLAYING MORE LIVE GIGS **THAN THE PREVIOUS YEAR**

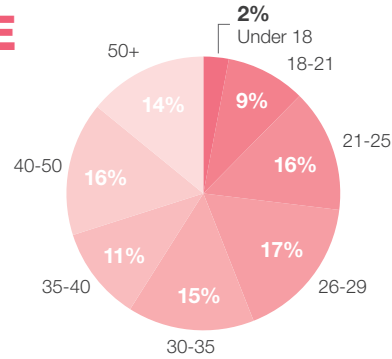
50% OF VENUES **SAID THEY WERE AFFECTED BY DEVELOPMENT, NOISE OR** PLANNING ISSUES

NEARLY A QUARTER OF THE AUDIENCE **- 24% - COME FROM OUTSIDE OF THE BRISTOL AREA AND TRAVELLED** OVER 10 MILES **TO A MUSIC EVENT IN BRISTOL**

ABOUT THE AUDIENCE

The biggest age group represented were the 21-29 year olds at 32%, 16% were between 40-50 and a third of the audience surveyed on the night were over 40 with 12% of the audience under 21.

58% were male and 42% female with the majority 67% in full time employment although 16% were students.



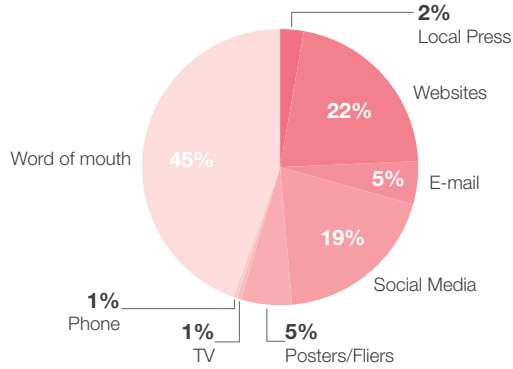
How big was the audience on census night?

We estimate that some **5000** people attended live music gigs on census night.

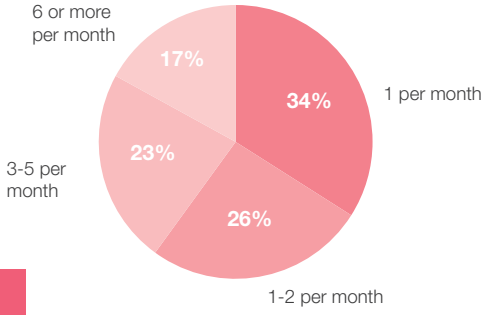
Approximately **24%** travelled more than **10 miles** to Bristol to hear live music.

The total capacity of the 23 venues staging live music on census night is calculated to be **9315**.

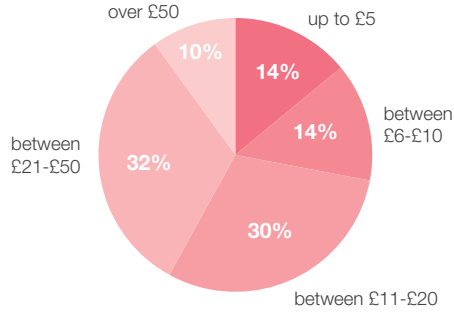
How did they hear about the gig?



When asked how many gigs do you attend a month?



When asked how much they spent on tickets a month?



Venue Case Study: THE FLEECE

Chris Sharp bought The Fleece in 2010 having played at the venue as a musician. At the time it programmed mainly tribute bands and had declining audiences. It was not the music venue it had been.

"I wanted to concentrate on rebuilding the reputation of the Fleece for cool music and to do that I had to change the business model bring in new acts and reduce the number of tribute band nights."

For a number of years this plan worked well and Chris restored the reputation of the Fleece and grew the audience. Then in 2013, four months after Government changes to planning legislation, the owners of the office block next door applied to convert the property into private flats. The big worry for Chris was that the Fleece could be closed down if new residents objected to the noise from the venue. So began a battle with the developers and planning inspectorate which continues to this day, and is now becoming a familiar story.

Chris recounts "the planning application was accepted but on the condition that high spec soundproofing was installed in the conversion and that fixed shut windows would be installed in all flats facing the venue". The developers appealed against the condition for fixed shut windows on the grounds that this was too expensive and their appeal was twice rejected by the City Council. By 2015 the developers had taken their case to the planning inspectorate. Chris created a petition gaining 44,000 signatures supporting the venue, however, this time the developers were successful in their appeal. It seems that the planning inspectorate had taken the opposite view from Bristol City Council and ignored the amendments to National Planning Policy Guidelines introduced on 24 Dec 2014 which specifically highlighted developments near to music venues suggesting that these developments must take "appropriate mitigation" in such cases. The planning Inspectorate's decision meant Bristol City Council had to pay the developers legal fees totalling over £20,000.

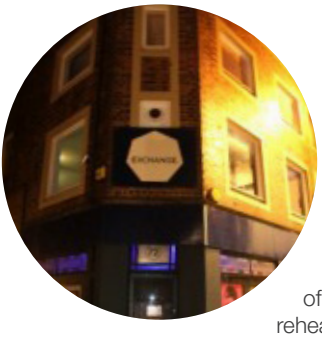
The problem as Chris sees it is that on the one hand the Agent of Change principles seem to support venues by putting the onus on the developers, but he argues, this will only work if these principles are applied in practice. This is not what's happening in the case of the Fleece.

Chris fights on but as he says "this is a concern for every venue in the country if they are located near commercial premises".

thefleece.co.uk

Photo courtesy of Chris Sharp at The Fleece

Venue Case Study: THE EXCHANGE



The Exchange is a popular venue frequently mentioned in our audience survey. It was opened in 2012 by the team who formerly ran The Croft which had been another popular venue in Bristol. Matthew Otridge one of the owners of the Exchange tells the story of how they came to buy the Exchange. “The Croft was in an area that was originally run down but had undergone gentrification and the lease was running out on the Croft building.” Learning from this experience they set about finding another venue where they could buy the freehold so that any decision to sell was their decision and that property was the Exchange. The Exchange holds live music on most nights of the week. Business is still good “but not as good as the old times at The Croft” said Matt who believes the live scene in Bristol is changing as they are seeing a fall in the popularity of their club nights compared to those they use to run at the Croft. Overall, though, the gigs are slightly better”. Matt thinks that diversification is becoming increasingly important and at the Exchange they have looked at ways to maximise the use of their venue by making one of their two rooms available as a rehearsal space.

Whilst the Exchange has not been seriously threatened by close developments so far they already plan to use the Agent of Change principles to object to the proposed development of student accommodation nearby. Overall Matt believes that “there needs to be greater legislative support for small live music venues in the same way as they have in Europe”. He also believes that the industry as whole needs to do more to support small venues which are making the early investment in new talent but not always reaping the rewards once that talent breaks.

exchangebristol.com

8. USING THE PRINCIPLES OF AGENT OF CHANGE

UK Music has been active in seeking to achieve a legislative framework that works in the interest of music venues. 2015 saw much activity following increased reports of music venues facing challenges in operating their businesses. The Mayor of London’s Music Venue Taskforce was formed and amendments were proposed to the Housing and Planning Bill currently before Parliament in an attempt to introduce an “agent of change” principle into law. These amendments would protect existing venues, particularly when nearby office blocks are turned into residential accommodation. This is necessary as building change of use has been made easier by recent liberalisations to planning law. So far in 2016 UK Music organised a meeting with three Government ministers to make the case for the agent of change principle and is working with both the Department for Communities and Local Government and the Department for Culture, Media and Sport to identify where they can support music venues.

Photo courtesy of The Exchange

Artist Case Study: LADY NADE
(NADINE GINGELL)

I was really scared and really young when I played my first gig. I had to sneak into the Old Duke to play the open mic night and pretend I was 18. But it was a real pin-drop moment. It was a busy pub and everyone was talking. Then I started to sing and everyone went silent. I thought, 'have I done something wrong?'

Pubs and open mic nights are so important for the development of artists who are just starting out. Or for established artists who want to go and try new things. In Bristol, there's probably an open mic every night of the week. There is a massive community of creative beings who are looking to network and collaborate. Everyone is supporting each other.

I grew up in Bristol, one of seven children. Earning a living off music, especially when you're just starting out, can be really hard. Youth music programmes (Bristol Plays Music; Studio 7) gave me opportunities and had a massive impact on developing my musical interests. Knowing how much they helped me, I'm now working as a music leader (at Trinity Bristol) to put back what I once gained to help other young people.

I am really passionate about writing songs and lyrics. If I can make other people feel that same emotion, and find a way to express it, I feel like I'm doing a great job.

Lady Nade's debut album *Hard to Forget* will be launched in May 2016.

ladynade.co.uk

Photo courtesy of Lady Nade

Artist Case Study: GET THE BLESSING (JAKE MCMURCHIE)

Albums: *Astronautilus*, *Lope and Antilope*, *OCDC*, *Bugs In Amber*, *All is Yes* – winner, BBC Jazz Awards Album of the Year, *Bleach Cake*

Our band was forged through local connections. We're a diverse group of musicians from different musical backgrounds, but we knew each other from the Bristol scene and we liked what each other was doing musically. Jim and Clive are part of Portishead (among notable others) and still play with them. I am a jazz musician. Pete is extremely versatile and plays in a wide variety of contexts. We started off playing together just for fun. Then we decided to do a few gigs. The Bristol scene allowed us to do that. Audiences liked us and encouraged us so we decided to write material of our own and record it.

That was the point at which we started to get more press locally. People noticed we were doing something different and interesting. Through Bristol connections our recording was passed to Candid Records and we were signed. Then we started to get national attention and we won the BBC Jazz Award for the best album in 2008. We have since toured all over Europe, North America, and parts of the Middle East. We like to think we don't sound like anybody else. A lot of what we do together is informed by what we do individually.

Live performance is absolutely critical. Get the Blessing exists within the jazz community, where the focus is instrumental and improvised music. Improvisation depends on live performance – the personalities of the musicians coming together and interacting with one another. We always play to the room, whether tiny clubs or cathedrals, and we can do that because we've done so many gigs together. That wouldn't have happened if people hadn't given us those early opportunities to perform.

It feels like Bristol has a greater number of music venues for the size of population than other cities. It's a very culturally vibrant city. There are a lot of people born outside of Bristol who have chosen to live in Bristol, and for all sorts of reasons. As a city, Bristol is big enough that the music and arts on offer are high quality, but small enough that it all feels close.

Likewise, the music scene is big enough to attract lots of great musicians, but small enough that we all know each other. The community is supportive and at gigs there is often a significant number of musicians in the audience. The community is strong and healthy.

Clive Deamer – drums and percussion
Jim Barr – bass, electronics
Pete Judge – trumpet, electronics
Jake McMurchie – saxophone, electronics

theblessing.co.uk

Photo courtesy of Get the Blessing

Artist Case Study: SHE MAKES WAR (LAURA KIDD)

Albums: *Direction of Travel* (released March 2016)*, Little Battles, Disarm*

I was an early adopter of technology and social media - it's always been a way of life for me, speaking to people all around the world (before Twitter I blogged and before that I had penpals!). I've never been afraid of it, so that approach - curiosity about other people - has worked for me. People often find out about my music because they've met me online first, rather than the other way around.

My ethos is that you can do anything yourself. We have all the digital tools available to make and release music. I didn't want to wait around for someone to give me permission to do it, I wanted to get on and build a world of my own. I've released two albums completely independently and I'm about to release my third album. I'm going from being completely DIY to now having a manager and a label on board.

Live music has been absolutely essential to my development as an artist. I've played in a lot of bands but when it came to my own music I wasn't focused, I just knew gigging should be part of it. When I put my first album out it all fell into place in my head. Playing live has helped me develop artistically and technically, spread the word to people one by one and meet loads of great artists along the way.

People forget that bands don't come fully formed and ready to play at places like the Fleece - they have to build an audience. When I moved to Bristol three years ago and put on my first gig I played to 15 or 20 people in the front room of The Croft. You need those places. Venues like the Stag and Hounds do so much for the music community, giving them an opportunity to play to people and gather fans. Now I can pull in an audience of 200 from putting on gigs, playing support slots, handing out cards, befriending people online, getting bits of press, and, I suppose, making music that people like (melancholy grungey pop).

When I moved to Bristol I immediately felt very welcome. I'd been putting on my own shows in London for a couple of years because as a solo performer, it's hard to get anything except a slot opening up for bands. I decided to create my own opportunities to headline so I hired the venues, promoted the gigs, booked (and PAID) bands to support. It was worth the extra work, and when I came to Bristol I continued doing that, and found the venues I worked with very accommodating and the audiences very friendly.

I love taking my music to different places and gathering people in to a room for a unique experience - the artist/band almost casts a spell over the audience. I think audiences are getting more on board with the fact that an artist doesn't need to be on a billboard to be worth going to see, and it feels like there's a buoyancy in live music at the smaller end of things. In Bristol, there are tons of shows on every night and I feel very thankful that people choose to come to my shows when faced with such a choice.

shemakeswar.com

Photo courtesy of She Makes War

Music Manager Case Study: UPSHOT MANAGEMENT (STEPHEN BARNES)

In the pre-internet days, (speaking as a young musician at the time) there were more straightforward indicators of progression you could see as a musician. At first you might press your own record and get it into a local shop. If it did well, word would spread and you'd get it into other shops. Specialist charts and local and national press, radio..and of course, touring and seeing your audience grow. All these factors fed each other, added up to something tangible. These were indicators things were progressing well for you.

Now it can be more difficult Live remains the one place where you can still get a sense of progression. It's real and tangible. You can go from playing in a venue with a capacity of 100 to 200, then 400 and 600… these steps are now more important than ever.

I've been in the music industry for 30 years. I moved from London to Bristol about 6 years ago. At first, I wasn't looking to get involved. But very quickly, you see young artists with talent, but without a clear path of progression. So I set up Upshot Management to build a structure around early talent and see them through.

Without structure, it's hard to break out of the postcode and export talent from the city to the nation and increasingly, internationally. There is so little money at the bottom of the industry. The question is how you create what you need without bankrupting yourself. You have to create a little greenhouse around the talent – nurture it first before taking it out into the cold hard world to see if it will grow.

The music industry is still very London-centric. But because of the wide range of talent in Bristol, there is a good skeletal structure of support in place. You have a supportive music press. BBC Introducing is very strong in the West. National promoters have a presence in Bristol. Artists work very closely with each other and learn from each other.

The very strong live scene in Bristol means you can spend time getting your art right before exposing yourself to the wider market. Live is still the number one way to get yourself out there, create a fan-base and use that as a springboard beyond the city. The main barrier to live is cost – whether to the band or promoter or punter. The constant question is where does income come from now?

upshotmgmt.com

Photo courtesy of Stephen Barnes

CONCLUSIONS

Live music is part of the rhythm of life in successful music cities like Bristol. People go to gigs as part of their weekly routine. Young and old, near and far. In Bristol, live music is everywhere and for everyone.

We draw this conclusion based on our findings that nearly a quarter of audiences on the night of our live music census travelled more than 10 miles to Bristol to enjoy the live music on offer. Nearly a third of audiences were over the age of 40. And 41% go to at least 3 gigs every month.

This culture of participation, community and engagement acts as a stimulus for both economic and cultural activity that is sustained through the generations.

By way of example, the artists we interviewed for our case study each independently pointed out that in any gig you'll find other musicians in the audience. Art inspires more art.

That ticket sales account for just 17% of the total generated by live music, shows that music is driving many other areas of local economic growth. The "getting out there" mind-set of music fans is stimulating significant spending into the wider Bristol economy.

That 'word of mouth' is a significant way in which people find out about gigs shows a thriving music community in Bristol that is connected and mobile.

Our research identified 94 venues in Bristol where live music is regularly played. These venues support a rich variety of style and musical genres.

From the census we concluded that live music generated £123 million of revenue in Bristol and supported 927 jobs. There is much to celebrate. And much to protect.

We found that 50% of the city's venues have come under threat from the redevelopment of commercial property for the housing market, which can only cause concern for the future of live music in Bristol.

The introduction of the changes to planning consent in 2013 (designed to encourage developers to provide more housing to help alleviate housing shortages in the UK) has had the unintended consequence of creating a serious threat to live music venues in Bristol. Developments where adequate soundproofing is not part of the design leave the door open for the incoming residents to complain about noise. The fear for venues is that this will force them to close.

Whilst the UK does not as yet have the Agent of Change principle (which requires the instigator of change to make adequate provision against noise) venue owners in Bristol are well aware of the Agent of Change principles and have been using these principles to challenge planning applications for nearby developments.

Our venue case study The Fleece highlights the real disconnect between the various authorities involved in planning consent. What is apparent is that there is a real need to showcase the value of music to the local economy in order to ensure that music venues, and their vital contribution is recognised.

Suggestions for further research

One of the difficulties with drawing further conclusions from the research was the lack of comparative data against which to test the results and detect trends or note change. We hope this study will help form a blueprint for future studies of music cities and towns across the UK to develop a bank of comparative data.

METHODOLOGY

This section looks at the methods used to collect the data for this report and the methods used to derive the economic impact of live music in Bristol.

Data Collection Methods

We used a mixed methods approach to collecting data for this report. Online questionnaires were devised along with the audience questionnaire for the face to face audience interviews which took place on census night. 22 October 2015. The team noted any particular observations on the night. Data was also taken from a number of published sources (see economic impact methodology below).

There were three separate online questionnaires developed; for the audience, venue operators and musicians which were available online one week before the census night took place and held open until the end of November.

Our research into the venue scene in Bristol identified 94 venues which were either exclusively live music venues or where live music is played. The vast majority of these were small independent venues, pubs or clubs with a few restaurants staging some live music. Bristol currently does not have a large arena or stadia although a 12,000 capacity arena is planned for 2018.

We found that 23 of these venues were staging a music event on the Census night. The Census night was on a Thursday which was suggested by UK Music's Live Music group as being more representative of an average night for live music in Bristol as opposed to a Saturday night. (See full list of venues taking part at end of this report).

The wide geographic spread of venues across the city posed a particular challenge for the team conducting the Census. The city was consequently divided into 5 areas by postcode with one team allocated to each area to ensure that all 23 venues were covered by the team

The Census team collected 230 audience responses on the night.

Interviews were conducted with two venue owners,three artists and an artist manager which provided more qualitative data for the study.

The Economic Impact of Live Music on Bristol

The economic impact of live music on Bristol's economy was assessed in terms of Gross Value Added (GVA). It is output (alternatively, referred to as revenue or turnover) minus intermediate consumption (alternatively, referred to as costs). It is a standard metric of economic analysis and in such analysis, three kinds of GVA impact are typically distinguished:

- First, the direct value added of live music venues in Bristol;
- Second, the indirect impact on the GVA of firms in the supply chain of these venues; and
- Finally, induced impacts on the GVA of firms outside the sector or supply chain, as a result of increased spending in the local economy due to increased employment associated with the direct and indirect impacts.

This analysis moves to estimates of GVA - as well as associated employment in Full Time Equivalent (FTE) terms - by quantifying relevant revenue and then translating these revenues into GVA and FTE. The starting point for building up this picture of revenue is previous UK Music research.

This Bristol research builds upon Wish You Were Here, the ground-breaking research undertaken by UK Music on live music and music tourism. Wish You Were Here draws upon an unprecedented volume of data on the purchase of concert and festival tickets, which is held by promoters, ticket agents and venues across the UK. This data is collated annually by UK Music and analysed by Oxford Economics.[1]

Oxford Economics were able to disaggregate box office data for live music events in Bristol from their modelling. This indicated that over £10m was spent on tickets for live music events in Bristol in 2014. We want our analysis to be for 2015, the most recent calendar year and also the year in which our census of live music goers in Bristol was undertaken, so uplifted this 2014 box office figure in line with the average annual growth of attendance at live music events in the south west region, which we calculated from the four years of model results from Wish You Were Here (2011 - 2014). Applying this growth rate indicates that box office spend in Bristol in 2015 can be estimated at £10.7m.

This census revealed that spending on tickets amounts to only 17 per cent of spending at or in association with live music events in Bristol. Based upon this percentage, the other consumer insight revealed by the census, and our estimate of box office spend in Bristol in 2015, below gives an overview of the total consumer spending in Bristol at or in association with live music events in 2015. Drink is the largest item, which may reflect the high proportion of gigs in Bristol taking place in pubs, bars and relatively small venues, though drink tends to be an important source of revenue at venues of all sizes. The spend on travel and accommodation reflects the capacity of live music to draw in visitors to the city.

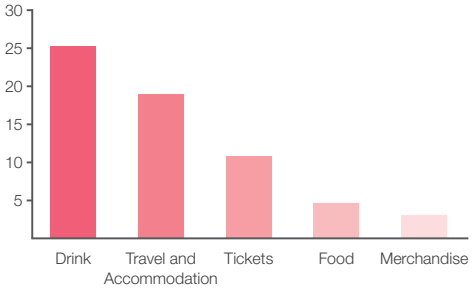


Diagram 1: Estimated spend at live music events in Bristol in 2015 (£m)

Having established the estimates of consumer spending illustrated in diagram 1, we estimated the second round spending that would follow from these levels of consumer spending by drawing upon data contained in the latest edition of the Annual Business Survey (ABS) published by the Office of National Statistics. In respect of each category of consumer spending in diagram 1, we reviewed the ABS to find the industrial category most likely to contain the kind of businesses that would have benefitted from this consumer spending. Then we used the ABS to take a ratio for each of these categories on turnover, which would have been added to by the consumer spending, and business purchasing.

[1] http://www.ukmusic.org/assets/general/WYWH_METHODOLOGY2015.pdf

Having derived the indirect revenues that are relevant to our model (i.e. business purchases), we sum direct and indirect revenues and apply the total to a sub-regional multiplier.[2] The multiplier gives us the total relevant revenues, while subtracting direct and indirect elements from this total reveals the induced element (i.e. the component of the total that follows from application of the multiplier). These steps allow us to present in diagram 2 below, which is the total revenues relevant to live music in Bristol in 2015, broken down into each of its components: direct, indirect and induced.

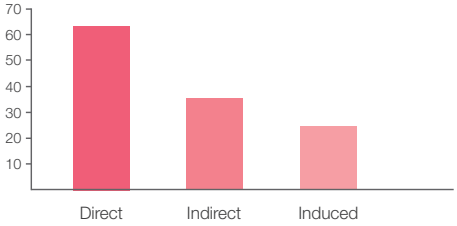


Diagram 2: Revenue Impacts from Live Music in Bristol in 2015 (£m)

We take ratios of GVA-to-revenue from the ABS for the relevant sectors to derive the GVA impacts shown below.

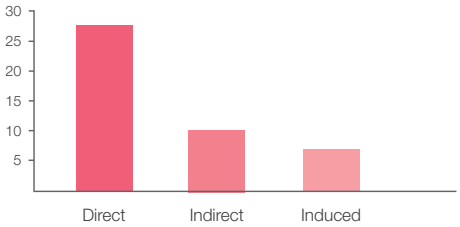


Diagram 3: GVA Impacts from Live Music in Bristol in 2015 (£m)

We take ratios of employment cost-to-revenue from the ABS for the relevant sectors, which we then convert into a Full Time Equivalent (FTE) measure of employment in Bristol by dividing these employment costs by the average annual full-time wage in Bristol, as illustrated below.

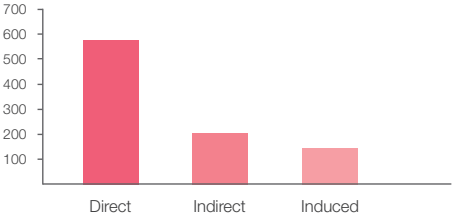


Diagram 4: Full Time Employment (FTE) Impacts from Live Music in Bristol in 2015 (£m)

In summary, we find that live music generated £123m of direct, indirect and induced expenditure within the Bristol economy in 2015, which equates to £45m in GVA and 927 Full Time Equivalent jobs.

[2] See paragraph 7.4 in this note by the Department of Business https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/191512/Research_to_improve_the_assessment_of_additionality.pdf

15. ACKNOWLEDGEMENTS

In memory of Andrew Potter.

As with all research projects there were many people who contributed to the Bristol Live Music Census and without whom we could not have conducted this research.

My thanks in particular go to Cathy Koester from UK Music for her untiring efforts and support on every front.

UK Music's Live Music Group for their invaluable support and advice.

The UK Music Live Music Group consists of:
- 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)
- Music Venues Trust

Musicians' Union, with particular thanks to Paul Gray

Thank You to the Brighton Music Industry Network (BMIN) and in particular to Michael Isaacs for your support and help.

The team from UK Music:
Jonathan Todd
Oliver Morris
Eva Lamont
Beatriz Ribeiro
Katherine Good
Jo Dipple
Ele Hill
Tom Kiehl
James Murtagh-Hopkins

The Staff team from Bucks New University:
Alan McBlane
Neil Mackey
Stan Erraught
Paul Fields
Steve Hoole

And our Bucks New University Music and Live Event Management student team:
Danika Bacon
Natasha Bird
Conor Burns
Paige Dennison
Lauren Freeman
Sam Gibson-Clarke
Jake Gray
Amy Hansford
Faye McCormick
Rachel Stollard
Hannah Wilcock

I am most grateful to the following 23 Bristol venues whose owners and managers allowed our team access to their venues and audience for the census on the night of 22 October 2015:
Bootlegger
Canteen
Colston Hall
Crofters Rights
Exchange
Fleece
Gallimaufry
Grain Barge
Golden Lion
Kingsdown Wine Vaults
Leftbank
Louisiana
Marble Factory/
Motion Bristol
Mothers Ruin
Mr Wolf's
No. 1 Harbourside
O2 Academy Bristol
Old Duke
Rope Walk
Stag & Hounds
Thekla
Thunderbolt

All material copyright © Bucks New University 2016

Buckinghamshire New University
Queen Alexandra Rd.
High Wycombe
Bucks
HP11 2JZ

For more information about the research contact: Teresa Moore at teresaam9@gmail.com

For all media enquiries contact: Dean Valler at dean.valler@bucks.ac.uk/James Murtagh-Hopkins Director of Communications, UK Music at james.murtagh-hopkins@ukmusic.org

For enquires relating to the Music Academic Partnership contact: Oli Morris Director of Education & Skills, UK Music at oliver.morris@ukmusic.org

For all design enquiries contact Simon McDowell at simon@simply-designs.co.uk