Arts Council England

Midlands Music Research and Consultation

Final Report

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BOP Consulting

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The Midlands: a music region

The music of the Midlands influences, inspires and entertains audiences across the world.

Globally renowned acts have emerged from cities across the Midlands, with for example Black Sabbath, Lady Leshurr and Steel Pulse from Birmingham; The Specials and the Two Tone genre from Coventry; Bauhaus, Slowthai from Northampton; Jake Bugg and Mez from Nottingham; and Goldie and Slade from Wolverhampton. Rock titans Robert Plant and John Bonham, of course, also hail from the region.

But it is not just the cities that are alive with music. There is an abundance of musical activity in the rural parts of the Midlands, too. A range of genres attract large audiences to festivals across the region (e.g. Shrewsbury Folk Festival; Upton Jazz Festival; and Download, which describes itself as *"the UK's premier rock festival"* and is held next to East Midlands Airport).

Past and present, heritage and contemporary, the Midlands musical output is diverse and constantly developing new sounds, stars and stages.

The contribution of music to the Midlands economy is also considerable. Our analysis indicates a direct contribution in 2017 of over 6600 jobs and £230m in Gross Value Added (GVA).

In addition to its direct contribution to the economy of the Midlands, music also makes other important economic, as well as cultural and social, contributions to the Midlands via:

- Spend on supply chains in the region – further spreading its economic impact
- City and regional brand-building – supporting inward investment
- Attracting and retaining businesses and staff – improving quality of life
- Music tourism – drawing more visitors to the Midlands
- Building cultural and social capital – enhancing community cohesion

The focus of this research is the East and the West Midlands – a significant geographical footprint, with the local authorities of the Midlands having a combined population of 10.6 million, around 16% of the total UK population.

Three challenges

This research explores three challenges to music in the Midlands which have the potential to transform the regional music scene.

These challenges are:

- **Talent development**: What talent development activity exists in the Midlands to support the development of artists and managers, especially diverse talent?
- **Music Ecology**: What does the regional landscape look like for music education, artists, artist management/labels, venues, formal and informal networks, industry bodies, and festivals?
- **Touring**: What are the key strengths and challenges for music touring in the Midlands for the selected genres (contemporary, folk, jazz, world)?

Key insights into these challenges

Our research has uncovered some key insights into these challenges:

- **Talent development**:
  - Overall, respondents to our survey are predominantly positive about their locality as a place to develop musical talent. We asked respondents to score their locality as a place to develop music talent – where 0 is a place that provides no support to the development of music talent and 10 is the highest possible level of support to the development of music talent. The largest proportion of respondents (21%) ranked support at 7.
  - The availability of 'a range of performance opportunities for those at different stages of their career' was the most frequently cited local

strength by survey respondents, followed by 'access to organisations who support talent development.'

- In terms of the barriers to the development of talent, 'lack of access to funding' is the barrier most frequently indicated by survey respondents, followed by a 'lack of local progression opportunities'.

— **Music Ecology:**

- Overall, survey respondents are relatively positive about their locality as a place for live music. They were asked to rate their locality as a place for live music. With 0 indicating a poor place for live music and 10 indicating world class destination for live music. 58% of respondents indicated a rank between 6 and 10.
- 'A strong range of local acts performing locally', followed by 'range of performance opportunities at different stages of the musical career', was the most frequently cited local strength of live music.
- 'A lack of live music venues' closely followed by a 'lack of marketing and promotion' and 'lack of audiences' were the most frequently cited barriers to live music vibrancy.

— **Touring:**

- Asked about particular local strengths relating to touring, 'audiences' were mentioned most often by survey respondents – either in terms of the potential for a wide/diverse audience, or in terms of the existence of a loyal audience base.
- Asked about the main barriers/challenges preventing respondents from booking or programming touring work, financial challenges were mentioned most often, due to either lack of funding or the costs associated with booking and promoting tours.

In respect of talent development, music ecology and touring, we have sought, as far as possible, to break our survey results down by geography, genre and diversity characteristics. What is striking is the consistency in our results across these different breakdowns.

This consistency suggests that the barriers to fulfilling the potential of music in the Midlands have some degree of invariability across the different geographies and genres of the region. If we take responses to our survey to be a proxy for musical engagement, we find this is skewed toward urban areas in the Midlands. For example, 22% of individual respondents came from Birmingham, 10% from Nottingham, and 7% from Leicester, contrasting with 11%, 3% and 3% respectively in terms of the proportions of the Midlands population attributable to these local authorities. Nonetheless, while urban Midlands may be more engaged with music than rural Midlands, we found similar challenges identified in relation to talent development, music ecology and touring across the region. Moreover, our literature review also indicates that similar barriers are experienced elsewhere. Beyond the Midlands, however, music networks seem better established. While the barriers to music fulfilling its potential are increasingly recognised, it seems that other places have gone further than the Midlands in utilising networks to address these barriers.

In our recommendations section, we describe a phased approach to building upon the existing strengths of the Midlands, as well as the self-determined purposes of music networks in the region, which is intended to have music networks in the Midlands do more to overcome these barriers.

These recommendations aim to help the Midlands address the challenges that it faces in respect of music, including:

— According to our analysis of Office of National Statistic (ONS) data, there is no evidence of statistically significant (Location Quotient) employment clustering in music-related employment in the Midlands

— The gap between the number of Musicians now in the Midlands (2700) and the number that it would need to have a statistical cluster (8450) suggests that the Midlands is less effective at developing and sustaining musical talent in the form of careers than elsewhere in the UK

— Music Venue Trust data indicates that the stock of music venues is declining more rapidly in the Midlands than elsewhere in the UK. The 3200 jobs that live music contributed towards the Midlands economy in 2017 are thought to be skewed towards larger venues and festivals, with greater economic challenges faced by smaller operations

- There is underrepresentation of diverse groups within the workforces of the cultural and creative industries in the Midlands
- The main strength of live music in different parts of the Midlands, identified by a survey run as part of this research, is the strength of local music acts, indicating that the Midlands possesses significant music talent. However, it has also been reported to us that the Midlands lacks the infrastructure to make the most of this talent, including:
  - Lack of:
    - i) Spaces to rehearse and perform
    - ii) Managers and booking agents to develop musical talent
    - iii) Traditional media to reach audiences – as well as, in some cases, ability to best utilise new channels (e.g. social media, streaming)
  - Weak networks to open-up performance and other opportunities.

1. Introduction and methodology

1.1 Introduction

1.1.1 Background

All the work of Arts Council England is guided by its corporate plan. Between 2018 and 2020, Arts Council England will invest a projected £939 million in Grant-in-Aid (funding from government) and approximately £425 million of income from the National Lottery in the arts, museums and libraries sector.

Three main types of investment are offered:

- National Portfolio Organisation (NPO) investment;
- Arts Council National Lottery Project Grants (ACNLPG);
- Development and Investment funds.

In addition to this, Arts Council England operates as the fund holder for Music Education Hubs (MEHs) on behalf of the Department for Education.

Previous research and anecdotal evidence have highlighted to Arts Council England some of the challenges facing the music sector in the Midlands. Alongside this, an analysis by Arts Council England of their investment suggests that contemporary popular music, folk, jazz and world music are genres that may benefit from further development support.

1.1.2 Three challenges

Across these genres, three challenges have been identified by Arts Council England:

- **Talent development**: What talent development activity exists in the Midlands to support the development of artists and managers, especially diverse talent?
- **Music Ecology**: What does the regional landscape look like for music education, artists, artist management/labels, venues, formal and informal networks, industry bodies, and festivals?
- **Touring**: What are the key strengths and challenges for music touring in the Midlands for the selected genres?

1.1.3 The Creative Case for Diversity

The Creative Case for Diversity is relevant to all these three strands: talent development, music ecology, and touring.

This sees diversity and equality as being crucial to the arts and culture, as they release the true potential of our nation's artistic and cultural talent – from every background. It is a way of exploring how arts and cultural organisations and artists can enrich the work they do by embracing a wide range of influences and practices. Arts Council England believes that embracing the Creative Case for Diversity helps arts and cultural organisations not only enrich their work, but also address other challenges and opportunities in audience development, public engagement, workforce and leadership.[1]

The Arts Council England definition of diversity encompasses the protected characteristics of the 2010 Equalities Act including race, ethnicity, faith, disability, age, gender, sexual orientation, pregnancy and maternity, and marriage and civil partnerships. It also includes class and economic disadvantage and social and institutional barriers that prevent people from participating in and enjoying the arts.

1.1.4 Networks

Human networks are groups or systems of interconnected people. These may have formal or informal structures. They, of course, vary tremendously in thematic and geographic focus.

Here, we are primarily concerned with networks focused, in one way or another, upon music within the geography of the Midlands. Equally, there are successful

[1] https://www.artscouncil.org.uk/diversity/creative-case-diversity

music networks elsewhere, which may contain lessons for the Midlands. Not least because these networks perform in such a way as to support responses to the three challenges (talent development, music ecology, touring).

It is, therefore, relevant to ask: What music networks now exist in the Midlands?

Given experience elsewhere, how might these networks be built upon, or new networks created, to better meet the challenges faced by the Midlands in respect of talent development, music ecology, and touring?

1.1.5 Geography

The geography over which we are researching talent development, music ecology, touring and networks is considerable. It covers:

- **East Midlands**: Derby, Derbyshire, Leicester, Leicestershire, Lincolnshire, Northamptonshire, Nottingham, Nottinghamshire, Rutland.
- **West Midlands**: Birmingham, Coventry, Dudley, Herefordshire, Sandwell, Solihull, Shropshire, Staffordshire, Stoke-on-Trent, Telford and Wrekin, Walsall, Warwickshire, Wolverhampton, Worcestershire.

1.2 Methodology

Our methodology explores the research questions set out above in respect of:

- Talent development
- Music ecology
- Touring
- Networks

This methodology has four components:

1. Formation of an **advisory group** to support this consultation and research;
2. **Literature review and data analysis**;
3. Two **focus groups** – one in the East Midlands; one in the West Midlands;
4. A **survey** that sought responses from across the Midlands.

1.2.2 Advisory group and other participants

An advisory group was convened to:

- Provide a sounding board for the research
- Help to identify individuals and organisations to attend focus groups
- Open-up their networks, to share the survey
- Attend two meetings – one near the start of the research (in the West Midlands) and one towards the end (in the East Midlands) – to help shape the research

The advisory group was composed of:

- Yasin El Ashrafi: HQ Familia
- Lyle Bignon: Birmingham Music Coalition
- Stephen Brown: Musicians Union
- Milicent Chapanda: West Midlands World Music Consortium
- Mark Dell: Nusic[2]
- Matt Grimes: Birmingham City University
- Catherine Hocking: Lakeside Arts Centre
- Stuart Issacs: East Midlands Jazz
- Joy Lamont: Shrewsbury Folk Festival
- Carol Leeming: Dare To Diva Productions
- Rich Legate: Attitude Is Everything

[2] With support from Sam Nahirny at Nusic

- Anton Lockwood: DHP
- Jen Mckie: Lincolnshire Music Education Hub
- Ciaran O'Donnell: Wolverhampton Music Education Hub
- Neil Pearson: Sounds Just Fine
- Carol Reid: Youth Music
- Despa Robinson: Be83
- Phil Rose: West Midlands Jazz Network
- Dharambir Singh: Musician
- Paul Spruce: Sidewinder
- Mary Wakelam-Sloan: Jazzlines

We would like to place on record our thanks to all advisory group members for their support and expertise.

We thank everyone who completed our survey and all attendees at our focus groups for their time and insight.

In addition, 1000 Trades in Birmingham and LCB Depot in Leicester kindly made spaces available for advisory group meetings and focus groups – thank you.

We also gratefully thank the Music Venue Trust for sharing data and insight on music in the Midlands.

Finally, BOP thanks Arts Council England for the opportunity to undertake this research.

BOP was assisted too by two researchers – Jez Collins of the Birmingham Music Archive and Ben Ryan of Signifier.

1.2.3 Literature and data review

We reviewed relevant literature for insights into our research questions. Largely, this literature was material familiar to the research team. In addition, we received additional literature from the advisory group.

In respect of some of our research questions, we found relatively limited insight in existing literature, particularly as directly relevant to the Midlands, with the East Midlands seeming less well-researched than the West Midlands.

Therefore, in providing new primary research to these questions, this research breaks new ground.

In addition, we reviewed and analysed data to assess the current scale of the music sector in the Midlands. We provide more methodological detail on this analysis in chapter 2.

1.2.4 Focus groups

Drawing upon participant suggestions made by the advisory group, two focus groups were convened: one in the East Midlands, one in the West Midlands.

In advance of these sessions, participants were informed that they would explore:

- How music talent development pathways might be strengthened in the Midlands
- How the music ecology of the Midlands might be enhanced
- How touring might be best facilitated in the Midlands.

In addition, these sessions were also used to debate the potential of music networks to address these issues.

1.2.5 Survey

The survey was hosted on the website of BOP Consulting. It was promoted by BOP, Arts Council England, and members of the advisory group. It ran from 27 February 2019 to 8 April 2019. It was targeted upon the music sector in the Midlands and 484 responses were received.

Respondents were given the option to reply as an individual or on behalf of an organisation. 65% replied as individuals.

Figure 1 No of respondents replying as individuals or on behalf of an organisation

	Total	%
Individual	312	65%
On behalf of an organisation	167	35%

Source: BOP Consulting (2019)

The largest proportion of these individuals were Musicians/DJs (50%), followed by music teachers (17%). In terms of the organisations that responded, music education organisations featured most highly – 52 ranked this as the 'primary role' of their organisation, 26 as a 2nd additional role and a further 10 as a 3rd additional role (a total of 88 having some music education role). This was followed by community arts (ranked primary role by 46, 2nd additional role by 24 and 3rd additional role by 11 – a total of 81).

Most individual respondents work predominantly in the popular/contemporary pop genre (128 respondents selected this as one of three genres; with jazz the second most popular at 87). 78 respondents selected folk music and 58 world music. Popular/ contemporary pop was also the most popular genre among those replying on behalf of organisations (selected by 70 respondents), again followed by Jazz (57 respondents). 44 respondents selected folk music and 43 world music.

Figure 2 Genres selected in which respondents' / their organisation's musical activity occurs (respondents could select up to three genres)

Genre	Individual respondent	On behalf of organisation
Brass bands	15	10
Choral	20	31
Classical	76	51
Experimental	46	20
Folk	78	44
Jazz	87	57
Media arts	24	15
Opera	12	9
Popular/ contemporary pop	128	70
Visual art – sound art	12	9
World Music	58	43

Source: BOP Consulting (2019)

In relation to the geographic pattern of respondents, 22% of individual respondents were based in Birmingham – more than any other place in the Midlands. This was followed by 10% from Nottingham. Similarly, the largest proportion of respondents' organisations is based in Birmingham (17%).

1.3 Report structure

In the next chapter, chapter 2, we analyse existing data to assess the current scale of the music sector in the Midlands.

Over subsequent chapters, we explore relevant research questions and in doing so, consider how barriers to growth might be overcome in each of these areas to further grow the music sector in the Midlands:

- Chapter 3: Talent Development
- Chapter 4: Music Ecology
- Chapter 5: Touring
- Chapter 6: Networks

In chapters 3 to 6, we bring out relevant findings from our literature review, focus groups, and survey.

Finally, in chapter 7, we provide recommendations for growing the music sector in the Midlands by addressing barriers in respect of each of talent development, music ecology, touring, and networks. We provide recommendations for both Arts Council England and the music sector in the Midlands.

Mr Wilson's Second Liners at Appetite's Big Feast 2015

Image © Andrew Billington.

2. Midlands music: scale of activity

The contribution of music to the Midlands economy is considerable. Our analysis indicates a direct contribution in 2017 of over 6600 jobs and £230m in Gross Value Added (GVA).

These direct economic contributions, however, understate what music brings to the Midlands economy. Music also encourages other economically important activities like tourism and improved perceptions of place, which support inward investment.

Our analysis of the economic contribution of music to the Midlands economy has implications for the three challenges that we set out in the previous chapter (talent development, music ecology, touring).

We conclude this chapter by detailing these implications. First, however, we present our analysis of the economic contribution of music to the Midlands.

2.1 Employment and GVA contribution of music in the Midlands

2.1.1 Definition

It is necessary to define the music industry to quantify its contribution to an economy. UK Music, the umbrella trade body for the music industry, publish an annual report, *Measuring Music*, on the contribution of music to the UK economy. The data at the UK-level that applies to this UK Music study is not consistently available at the geographic level of the Midlands.

The definition of the music industry that we apply to the Midlands economy is that which mirrors the UK Music definition as closely as possible, given what data is available on relevant activities at the geographic level of the Midlands. This is illustrated in the figure below.

Figure 3 Definition of music used by UK Music and equivalent definition used in this research

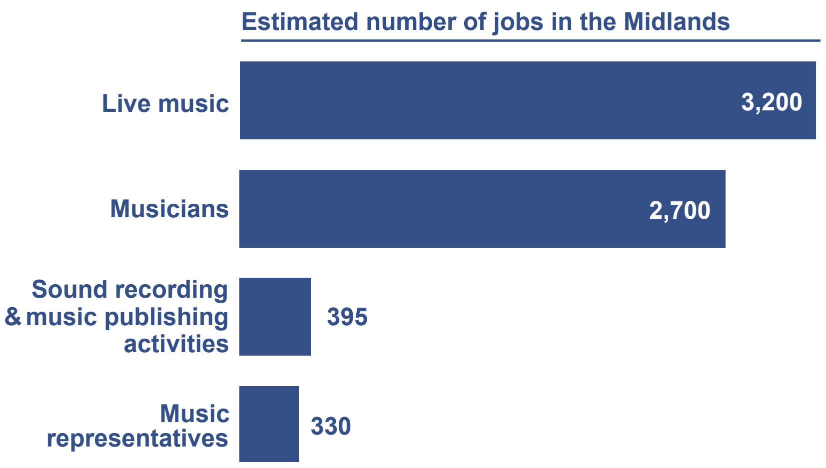
UK Music definition		Midlands definition and approach
Sectors	**Sub-sectors**	.
Live music	Music festival organisers, music promoters, music agents	We used the same definition of live music as UK Music and derived an estimate of the economic contribution of live music to the Midlands economy from past UK Music publications
	Production services for live music	
	Ticketing agents – the proportion of their activities involved with live music	
	Concert venues and arenas - the proportion of their activities involved with live music	
Musicians, Composers, Songwriters, Lyricists	Musicians, singers	We use Office of National Statistics (ONS) data on the Standard Occupation Code (SOC) for musicians in the Midlands
	Composers, songwriters, lyricists	
Music representatives	Collecting societies	No. of workers at the PRS for music/ PPL office in Leicester, plus our estimate of the no. of music managers in the Midlands, derived from analysis of ONS data and the survey for this project
	Music managers	
	Music trade bodies	
Recorded music	Record labels	We use ONS data on the Standard Industrial Code (SIC) for sound recording and music publishing activities in the Midlands
	Online music distributors	
	Design and manufacture of physical products and packaging	
Music publishing	Music publishing	
Music producers, recording studios, staff	Music producers	
	Recording studios and staff	

Source: UK Music & BOP Consulting, 2019

2.1.2 Employment contribution of music in the Midlands

On the definition above, the figure below illustrates our results on employment within the different component parts of the music industry in the Midlands.

Figure 4 Employment in the music sector in the Midlands (2017)



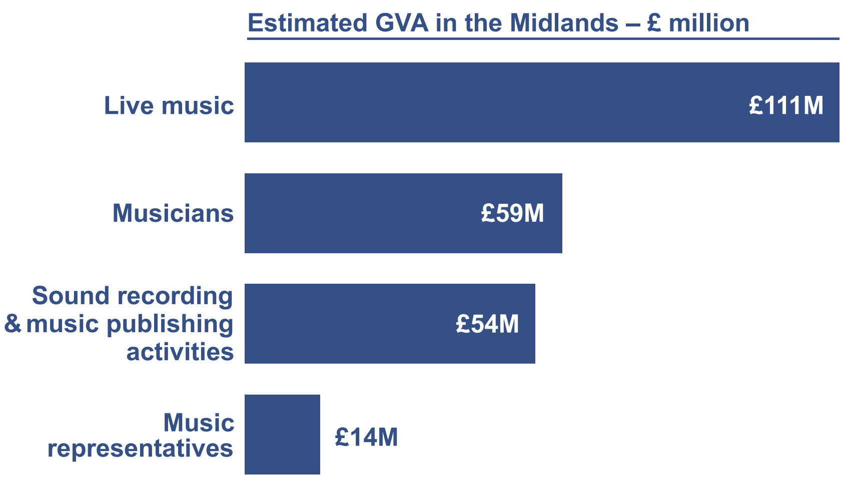
Source: UK Music, ONS, BOP survey, BOP analysis (2019)

One in twenty of the Midlands jobs in Arts, Entertainment and Recreation are directly attributable to music[3] and music's direct employment contribution across the Midlands outstrips that of construction in Nottingham.[4]

2.1.3 GVA contribution of music in the Midlands

On our definition, the figure below illustrates our results on GVA within the different component parts of the music industry in the Midlands.

Figure 5 GVA in the music sector in the Midlands (2017)



Source: UK Music, ONS, BOP survey, BOP analysis

Live Music

We estimate that live music is the largest contributor to the music economy of the Midlands, in terms of both jobs and GVA.

[3] 80,000 people work in Arts, Entertainment and Recreation in the West Midlands and 56,000 do so in the East Midlands (according to NOMIS profiles of the regions). This creates a combined total of 136,000. With 6,625 being roughly 5% of 136,000.

[4] 6000 people work in construction in Nottingham, according to the NOMIS profile of the local authority.

The direct and indirect[5] spend of music tourists[6] in the Midlands in 2017 was estimated in *Wish You Were Here*, a UK Music study, as £447m – 11% of the total across the UK.

This £447m does not correspond to our estimate of live music's contribution to the economy of the Midlands in these senses:

— We focus our estimates of the economic contributions of different parts of the music industry upon their direct contributions in terms of employment and GVA, whereas the £447m;
  - Includes indirect spend;
  - Is a revenue metric, rather than an employment or GVA metric;[7]

— It does not include spending by locals, rather than music tourists, at live music events.

Separately, UK Music publishes *Measuring Music*, which reports on employment and GVA, rather than revenue, and on the direct economic contribution of live music, including spend by local attendees at live music events. Therefore, *Measuring Music* reports on the relevant metrics to our analysis – but only at UK-level, rather than Midlands-level.

As the direct and indirect spend of music tourists reported in *Wish You Were Here* in the Midlands in the 2017 equates to 11% of the UK total, we assume that the Midlands contribution to the metrics reported in *Measuring Music* also equates 11% of the UK totals of these metrics. This corresponds to £111m in GVA and 3200 jobs.

Musicians

Past research has indicated that *"there are"estimated to be more than eight million bands in the world, a small fraction of which are signed with record deals and even less of whom are signed to a major record label."*[8] In the face of such competition, the challenge for musicians to make a living their art is intense.

Data maintained by the ONS provides an estimate of how many people within the Midlands are earning a living from being a musician. Responses to the Annual Population Survey (APS) indicate that there are 2,700 workers within the Musician Standard Occupation Code (SOC).[9]

The latest edition of UK Music's Measuring Music (2018) reports 91,153 working in the UK, with a GVA-per-Musician of just under £22,000. Multiplying this GVA-per-Musician figure by our estimate of the number of Musicians indicates that the annual GVA contribution of Musicians to the Midlands is £59m.

Sound recording and music publishing

The figure below shows the employment figures reported for 2017 in the Standard Industrial Classification (SIC) code of Sound Recording and Music Publishing Activities for each of the Local Enterprise Partnerships (LEPs) in the Midlands – with a total of 395 jobs being reported.

The Sound Recording and Music Publishing SIC code is the only music related SIC code within the basket of SIC codes that the Department of Digital, Culture, Media and Sports (DCMS) use to define the creative industries. As UK Music have consistently argued, it would be preferable to have SIC codes that better capture the breath of activity involved with music. ONS are, however, constrained by the international classification systems within which the UK SIC codes sit.

Nonetheless, we also derive the GVA-per-job for this Sound Recording and Music Publishing SIC code from the latest Annual Business Survey published by the ONS and multiply this GVA-per-job figure by 395 to indicate that this SIC code contributed £54m to the GVA of the Midlands in 2017. This is likely an

[5] Indirect spending does not correspond to the spending of music tourists on their trips to live music events, it is the supplier chain spending required to service this direct spending by music tourists, e.g. music tourists spend directly on stays in hotels, while hotels make purchases from suppliers to enable them to serve these music tourists.

[6] People travelling more than twice their usual commuting distance to attend a live music event.

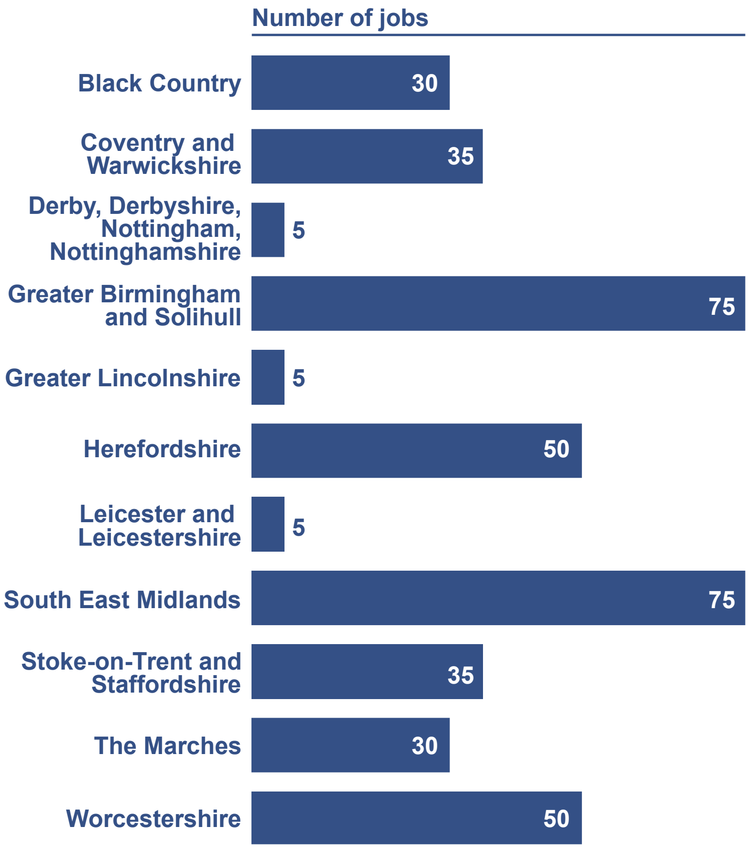
[7] Not all revenue or turnover contributes to GVA, which equates to the 'gains from trade' – the profits of firms and the wages of workers.

[8] Fenix.Cash, *White Paper*, March 2018

[9] This figure averages the responses provided with the East Midlands and the West Midlands over three APS surveys: July 2017 – June 2018; October 2017 – September 2018; January 2018 – December 2018.

underestimate as not all sound recording and music publishing businesses are correctly allocated to the appropriate SIC code. We are aware, for example, that the employment figure reported below to the Derby, Derbyshire, Nottingham and Nottingham LEP underestimates local employment in these activities.

Figure 6 Employment in sound recording and music publishing activities in Midlands LEPs (2017)



Source: BRES survey by the ONS

Music representatives

PPL PRS was created so that venues, companies and organisations which want to play recorded music in public will no longer need to buy separate PPL and *PRS for Music* licences. PPL PRS is reported as now employing 175 staff at its office in Mercury Place, the former home of the Leicester Mercury, near Leicester Railway Station.[10]

In the survey that we ran for this project, we asked respondents to indicate their role in the music industry. These responses suggest that there are around 20 Musicians for every Music Manager in the Midlands. We use this ratio to move from our estimate of the number of Musicians in the Midlands to an estimate of the number of Music Managers in the Midlands.

We sum the number of PPL PRS workers in Leicester and our estimate of the number of Music Managers in the Midlands to estimate the total number of workers in the Midlands within the Music Representatives category. We move from this employment estimate to an estimate of GVA for Music Representatives in the Midlands by assuming that the GVA contribution of these workers equates to the average per worker reported in *Measuring Music*.

2.2 Broader benefits of music in the Midlands

The direct economic contribution of the core music industry understates the full economic contribution, as well as the social benefits, of these activities. This is because there are various wider benefits that are typically catalysed by music activities.

Past research – for example, in the Auckland Music Strategy, 2018-2021 – has identified these wider benefits:

- Strengthening social fabric
- Cultural development and artistic growth
- City brand-building

[10] https://www.leicestermercury.co.uk/news/business/music-firm-ppl-prs-adds-1115733

- Attracting and retaining business and staff
- Music tourism

We reference Auckland to illustrate that cities and regions across the world are thinking more carefully about how they leverage music for economic and social benefit. More of a flavour of this is given by the international studies referenced in the bibliography contained in an appendix to this report – featuring studies from Seattle to Aarhus; New York to Melbourne.

To keep up, the Midlands must match cities and regions elsewhere in its ability to leverage the economic and social advantages of music. The extent of these advantages is illustrated in a report that BOP prepared for the Creative Industries Council:[11]

The UK's music industry makes over half its revenue from exports – well above the 30% average for the economy as a whole. Music exports earned £2.2bn in revenue in 2015, according to the latest figures published in Measuring Music, UK Music's annual study into the sector's economic impact.

British recorded music continues to dominate charts all over the world. Five of the top 10 selling artists in the world last year are British, and 1 in 6 albums bought globally were by British talent. The global recognition and success of UK artists like Adele, Coldplay and Ed Sheeran helped UK music exports rise by 8.9% between 2014 and 2015. PRS for Music, the collecting society, reported an increase in international revenues of £195.6m in 2015, a growth of 10.4% on the year before.

Live music attracts hundreds of thousands of overseas visitors to the UK each year, bringing revenue directly into city and regional economies. More than 823,000 overseas tourists contributed to UK exports in 2016 by visiting the UK for live music events. Taking into account both international and domestic music tourists, as well as the full supply chain impacts of their spending, music tourism generated £4bn in revenue for the UK in 2016, with the benefit spread amongst cities across the UK.

- *154,000 music tourists generated £45 million in revenue in Brighton in 2015.*
- *153,000 music tourists generated £35 million in revenue for Newcastle in 2015.*
- *38,000 music tourists generated £28 million in revenue in Coventry in 2015.*

Localities in the UK increasingly value these benefits. For example, Kirklees Council recognises the value of music in having a role to play in placemaking, as outlined in the Kirklees Economic Strategy. There is such a strong tradition of music making in the Kirklees district – as there is in the Midlands – that Kirklees Council wishes to build upon it to promote the area and bring communities together.[12]

2.3 Three challenges: implications

In addition to providing insight into the scale of the music sector in the Midlands, the numbers reported in this chapter can be analysed in ways that provide insight relevant to the three challenges of talent development, music ecology and touring, which we are exploring in this report.

2.3.1 Talent development

Location Quotients (LQs) describe the extent to which there is a comparative cluster of workers or businesses. It compares the density of certain kinds of workers in an area to the nation average. A figure of 1 or above means a higher density than the Great British average, and lower than 1 indicates less density.

Analysis of ONS data on the number of Musicians in the Midlands and Great Britain produces an LQ of 0.3 for the Midlands. The Midlands would need to have 8450 Musicians to claim a cluster on this basis – considerably more than the 2700 that we report.

The gap between the number of Musicians now in the Midlands (2700) and the number that it would need to have a statistical cluster (8450) suggests that the

[11] Creative Industries Council, *Creative Industries, A Toolkit for Cities and Regions,* 2017

[12] Music in Kirklees, *A policy to develop music in the district 2017-2020*

Midlands is less effective at developing and sustaining musical talent in the form of careers than elsewhere in the UK.

That said, the Midlands is a large geography and it is unusual for such a large geography to display evidence of employment clustering across its entirety. It may be that there is stronger clustering in places within the Midlands. While the ONS data on employment of Musicians does not break down to a more local geography than that of the Midlands, the figure below compares the rate of response to our survey by individuals and organisations by local authorities in the Midlands to the proportion of the Midlands population accounted for by these local authorities. If we take the rate of response to our survey as a proxy for the extent of music activity in these local authorities, the figure suggests that this activity is skewed towards urban areas. For example, 22% of individual respondents came from Birmingham, 10% from Nottingham, and 7% from Leicester, contrasting with 11%, 3% and 3% respectively in terms of the proportions of the Midlands population attributable to these local authorities.

Figure 7 Local authorities of individual respondents and organisation respondents (percentage of responses by category) and percentage of Midlands population by local authority

Local authority	Location of individual respondent	Location of organisation respondent	% Midlands Population (ONS, 2017)
Birmingham	22%	17%	11%
Coventry	3%	3%	3%
Derby	1%	5%	2%
Derbyshire	4%	6%	7%
Dudley	2%	3%	3%
Herefordshire	1%	1%	2%
Leicester	7%	6%	3%
Leicestershire	3%	3%	6%
Lincoln	2%	0%	counted within Lincolnshire
Lincolnshire (except North and North East Lincolnshire)	7%	1%	7% (including Lincoln)
Northamptonshire	3%	2%	7%
Nottingham	10%	7%	3%
Nottinghamshire	7%	3%	8%
Rutland	0%	0%	0%[13]
Sandwell	3%	3%	3%
Shropshire	1%	4%	3%
Solihull	1%	1%	2%
Staffordshire	4%	8%	8%
Stoke-on-Trent	1%	3%	2%

[13] This rounds to 0%, i.e. is less than 0.5%.

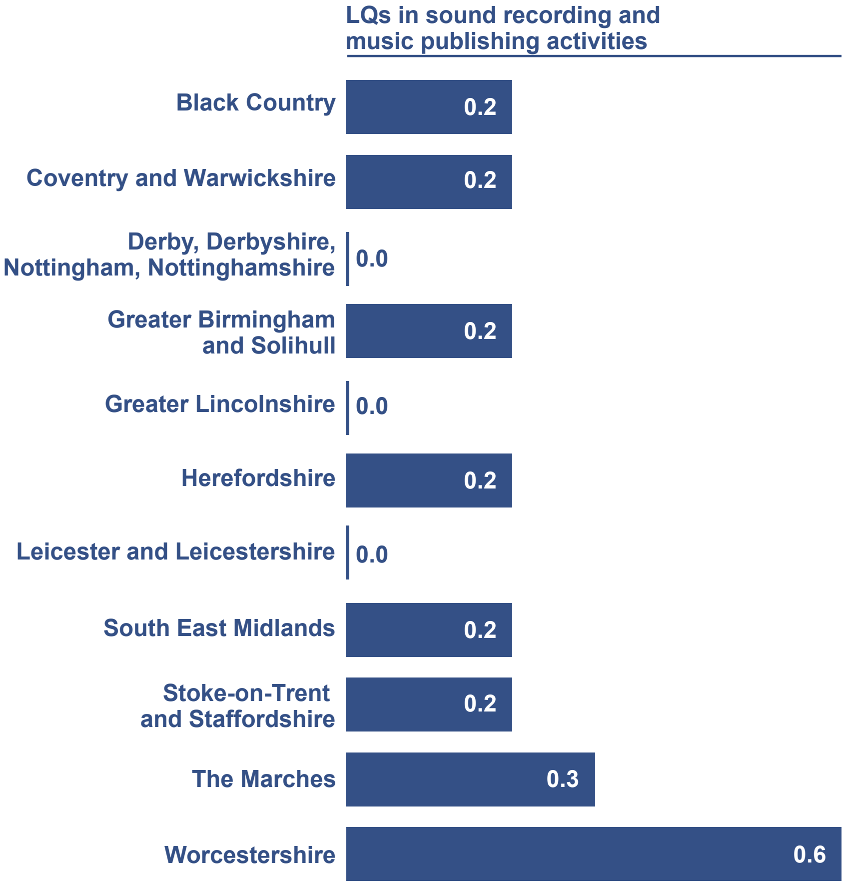
Telford and Wrekin	0%	3%	2%
Walsall	1%	1%	3%
Warwickshire	5%	6%	5%
Wolverhampton	1%	3%	2%
Worcestershire	7%	6%	6%
Not based in Midlands	1%	2%	/
N=	269	145	10,632,372

Source: BOP (2019)

2.3.2 Music ecology

The figure below indicates that no Local Enterprise Partnership (LEP) in the Midlands can claim a statistical cluster in Sound Recording and Music Publishing Activities. While ONS data has limitations (e.g. not all relevant activity being correctly allocated to the appropriate SIC code), it does provide a basis for assessing the extent of this activity relative to the rest of the UK through LQ analysis. No LEP in the Midlands crosses the statistical threshold for a cluster of having an LQ above 1.0. As the LQ is a statistical technique for comparing the extent of activity against the national average for this activity, this pattern does not seem to suggest that the Midlands has a relatively strong music ecology compared to elsewhere in the UK.

Figure 8 LQs in sound recording and music publishing activities in the LEPs of the Midlands (2017)



Source: BOP analysis of ONS, BRES data (2019)

Similarly, CC Skills report data on numbers in music occupations by region and do not report on numbers in music occupations in the East and West Midlands due to a low base size.[14] While this likely understates the extent of work in

[14] https://ccskills.org.uk/supporters/advice-research/article/workforce-analysis-2018

music occupations in the Midlands, it is noticeable that no other UK region has reporting on employment in music occupations suppressed in this way, suggesting that the Midlands has fewer people in these occupations than elsewhere.

2.3.3 Touring

Figure 4 indicates that 3,200 of the 6,625 music jobs in the Midlands (48%) are in live music. This is significantly larger than the other industry segments reported in Figure 4. While data does not exist to provide this breakdown, it is likely that a considerable part of this contribution will come via large venues and festivals. It is possible that a strong overall performance for live music within the Midlands, driven to a substantial extent by these large venues and festivals, combines with a weaker performance in the Midlands at smaller venues and festivals. We provide evidence in chapter 5 (on touring) that this may be the case.

Birmingham Weekender 2015

Image © Verity Milligan / Birmingham Weekender

3. Talent development

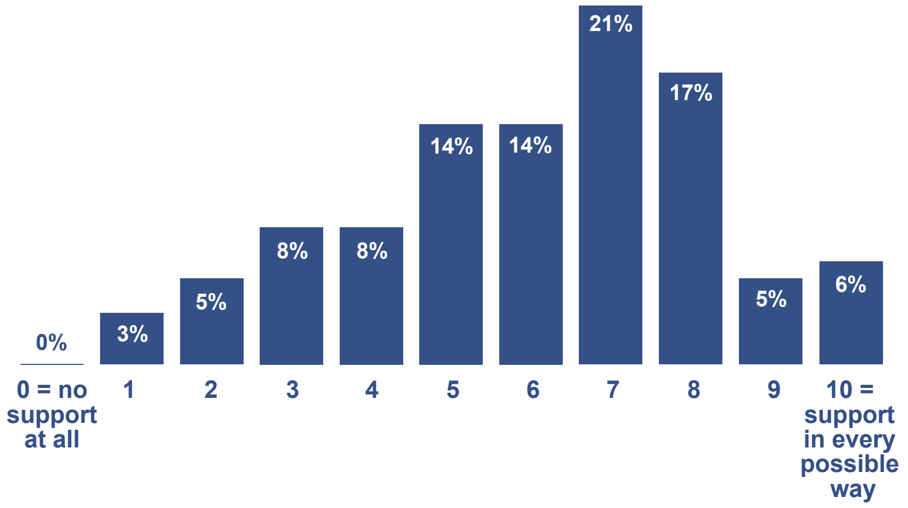
This chapter presents the findings from our survey and other research that are relevant to talent development in the Midlands.

3.1 Survey findings

Overall, respondents are predominantly positive about their locality as a place to develop musical talent. We asked respondents to score their locality as a place to develop music talent – where 0 is a place that provides no support to the development of music talent and 10 is the highest possible level of support to the development of music talent. The largest proportion of respondents ranked support at 7 (21%). 66% ranked support at ranks 5-8. In contrast, 16% ranked support at rank 0-3.

While our previous chapter indicates that in some respects, the Midlands has scope for catch-up relative to other parts of the UK in relation to music employment, the positive perception of the Midlands as a place to develop music talent illustrated in Figure 9 suggests that the key requirements for the Midlands to grow music employment are in place. There are perceived to be ways in which the Midlands might be a better place to develop music talent, as we discuss later in this chapter, but the findings in Figure 9 indicate that there are positives to be built upon in the region.

Figure 9 How highly respondents rank their Midlands locality as a place to develop musical talent



Source: BOP Consulting, 2019 (n=343)

A total of 322 respondents replied when asked to tick up to three strengths for developing musical talent in their locality. Among these, the availability of ‘a range of performance opportunities for those at different stages of their career’ is considered the main local strength by most respondents (receiving 214 responses, ticked by 66% of respondents), followed by ‘access to organisations who support talent development’ (receiving 153 responses, ticked by 48% of respondents).

This pattern showed little variation when controlled for respondents’ predominant musical role, the genre in which respondents’ musical activity occurs, or indeed when grouped by East and West Midlands:

— By respondents’ predominant musical role, ‘the range of performance opportunities for those at different stages of their career’ was considered as most important among all except music producers, who, reflecting their own role in the music ecosystem, ranked ‘available rehearsal space’ as a stronger local strength.[15]

- By genre in which their musical activity occurs, respondents from almost all genres again saw ‘a range of performance opportunities’ as the strongest local asset for talent development. (Among the ‘visual art – sound art’ genre, slightly more respondents felt that ‘access to organisations supporting talent development’ and ‘available rehearsal space’ were the strongest assets).[16]
- By geography, ‘a range of performance opportunities for those at different stages of their career’ came out strongest in both the West Midlands and East Midlands (117 and 87 ticks respectively). The next highest number of ticks in the West Midlands was for ‘access to organisations who support talent development’ (80), while in the East Midlands the second highest-rated was ‘available rehearsal space’ (72 ticks) (see Figure 10).

Figure 10 Perceptions of main strengths for developing musical talent in respondents’ locality – geography of respondent/ respondent’s organisation

	ALL	West Midlands	East Midlands	Outside Midlands	National organisation	Left blank
A range of performance opportunities for those at different stages of their musical career	**214**	117	87	2	2	6
Access to organisations who support talent development	**153**	80	61	3	4	5
Available rehearsal space	**148**	68	72	2	1	5
Access to advice and music networks that can support career development	**128**	55	64	1	2	6
Joined up and visible progression routes	**61**	33	24	0	2	2
Access to Management	**22**	7	14	0	0	1

Source: BOP Consulting, 2019 (n for ALL = 322)

[15] Note that this is based on very small numbers, with 9 the highest rating for ‘available rehearsal space’, and cannot therefore be considered representative

[16] Note that this is based on very small numbers (the two options that received most ticks received only 5 ticks each), and cannot therefore be considered representative

Overall, 341 respondents replied when asked to tick up to **three barriers to developing musical talent** in their locality. Among these, 'lack of access to funding' is considered the main barrier by most respondents (receiving 212 responses, 62% of respondents), followed by a 'lack of local progression opportunities' (receiving 175 responses).

Again, this pattern showed little variation when controlled for respondents' predominant musical role, the genre in which respondents' musical activity occurs, or when grouped by East and West Midlands:

— When controlled by respondents' predominant musical role, 'lack of access to funding' was seen as biggest barrier among all except those doing music in community settings (who rated 'lack of local progression routes' and 'lack of performance opportunities') as slightly bigger barriers.[17]

— By genre in which their musical activity occurs, respondents from all genres except folk, experimental and visual art-sound art saw 'lack of access to funding' as the biggest barrier to talent development. Representatives of all these three genres ranked 'lack of progression opportunities' as slightly higher, followed by access to funding.

— Both East and West Midlands respondents saw 'lack of access to funding' as the biggest barrier, followed by 'lack of local progression opportunities'.

Asked in an open question how musical talent development could be better supported, respondents referred to:

— the need for better access to funding (e.g. national funding, support for publicity, investment in talent development - in particular for those from low income backgrounds, for Continuous Professional Development, CPD)

— demonstrating music as viable career path - including chances of accessible funding as well as paying appropriate performance fees to musicians; these are seen as too low at present

— better sector networking and clear progression routes

— ongoing support, resources and CPD throughout a musical career

— more live music venues where emerging artists can hone their skills

— access to quality training, including training with established artists

— the need to put Birmingham and other Midlands locations on the music/touring circuit, for it to be able to compete with London and retain its talent

3.2 Other research

3.2.1 Education and talent development

"*Musical skills need be nurtured at the earliest opportunity*," UK Music argued in 2018.[18] "*This needs to begin at primary school and play a significant part in continued curriculum learning. However, music provision in state schools - where 91 per cent of children are educated - is in marked decline. The latest GCSE results revealed a 7.4 per cent drop in the number of pupils taking the subject despite overall GCSE entries increasing by 0.2 per cent in the 2017/18 academic year*".

In addition to the UK Music report, further studies from Youth Music, Musician's Union and BPI also highlight that an overall decrease in music education in schools, and reduced access to music, especially in state education, is leading to an inequality of opportunity.[19] This has a potential impact on the future talent development pipeline.

The Midlands has 31 FE institutions that provide 76 music-based programmes and there are 21 HE Institutions providing 179 programmes (though 40 of these are combined programmes at Derby University). There are also 69 postgraduate programmes involving music in the Midlands. Applying the sector average of 20 students per undergraduate course and 5 students per

[17] Again, this is again based on very small numbers, with 5 the highest rating and cannot therefore be considered representative

[18] UK Music, 2018. *Securing our talent pipeline*

[19] Youth Music, based on research by Birmingham City University, 2019. *Exchanging notes: Research summary report*; Musicians Union, 2018. *Understanding how income affects likelihood to learn an instrument*; https://www.rhinegold.co.uk/music_teacher/new-research-finds-21-decrease-in-music-provision-in-englands-state-schools/

postgraduate, this suggests that there are 3925 music industry students currently in HE across the region.

The range of courses covers a wide range of music and music industries activity. From the internationally acclaimed Jazz studies offered by the Royal Birmingham Conservatoire, to popular music studies at institutions such as BIMM and The Academy of Contemporary Music to composition, performance and music technology in the FE sector and music industry theory at numerous HE institutions.

The education sector is developing and producing highly skilled performers, entrepreneurs and start-up businesses in jazz, folk, world and popular music. This creates a pipeline of talent for the music industry sector in the Midlands. It is important that this talent is connected as effectively as possible to relevant career opportunities. In our recommendations chapter, we discuss networks having a role in improving connections between music education and the music industry.

3.2.2 Focus groups

The focus groups expressed a concern that a lack of infrastructure encourages a ‘talent drain’ away from Midlands to London, not just around musical talent but musical support services (e.g. managers/producers). At the same time, the infrastructure and opportunities that do exist in the Midlands might be better joined-up and signposted.

Our reporting upon the focus groups in our next chapter on music ecology says more about the infrastructure that is perceived to be lacking in the Midlands.

Some challenges were also raised at the focus groups that, to some extent, mirror the focus of the survey responses upon funding:

— It is easier to access public funding in relation to music services for those facing challenges (e.g. those not in education, employment or training, NEET). There is a desire from the sector to do more to support those not in these categories and after funding periods have ended.

— Organisational behaviour can be skewed towards that which will unlock funding.

3.2.3 Diverse talent development

The Midlands has always been central to diverse British culture, launching bands such as UB40 and Steel Pulse and delivering a strong underground culture around drum and bass, punk, reggae and dub, hip hop, jazz, and folk music.

However, it also experiences similar issues to those experienced across the UK around developing diverse talent. Arts Council England’s, *Equality, Diversity and the Creative Case: A Data Report, 2017-2018*, shows that people from a Black and minority ethnic background and disabled people are under-represented across the workforce and leadership of the sector compared to the total working population.

The report *Destination Birmingham* highlights the point that diverse talent exists but that it just needs a quality structure and a longer-term approach to sustaining it. It states:

> “ This includes better signposting and career advice sessions and supporting some of the volunteering and mentoring programmes that exist.

Arts Council England currently supports diverse talent development through its National Portfolio Organisations, such as Small Green Shoots, Future Bubblers, Baby People and Punch Records. Future development opportunities are available through Arts Council National Lottery Project Grants, Developing Your Creative Practice funding as well as signposting to national opportunities such as BBC Introducing and Music Managers Fund. Arts Council England also manages investment for Music Education Hubs, which have key deliverables around progression and providing opportunities for all children & young people regardless of their background.

Initial mapping completed as part of this research project has identified over 80 organisations in the Midlands with some diverse music component. This suggests that there is some degree of support for musical talent development for those from diverse backgrounds. These organisations do seem skewed, however, towards concentrations of population in the Midlands. 32% of the organisations identified are in Birmingham (11% of the population of the Midlands), 13% in Nottingham (3% of the population of the Midlands), and 10% in Leicester (3% of the population of the Midlands). The relatively high number of these organisations in Birmingham is perhaps also consistent with our survey. In this, when asked about strengths for developing music talent, the second highest number of ticks in the West Midlands was for 'access to organisations who support talent development'.

An example of an organisation that seeks to support the development of diverse music is the OHMI Trust, a Birmingham-based charity pioneering the development and adaptation of musical instruments for people who are physically disabled. Its objective is to remove the barriers to music-making so as to enable full and undifferentiated participation in musical life. To support the teaching and learning of music with adapted instruments OHMI, support by Arts Council England, was funded to conduct a teaching pilot using specially adapted instruments for children aged 7-11 years.

Evaluation of this pilot concluded:[20]

— Children with a physical disability are able to play musical instruments alongside their peers if some adjustments are made, both to the instruments, and to the teaching.

— Teachers involved in the pilot found that they did not need to significantly alter their own professional practice.

— Neither did they need to work with different teaching and learning resources, such as printed materials and backing tracks.

— What teachers involved in the pilot did find was that for children with complex needs, they needed to proceed at a pace suitable for the individual child.

— For many of the children involved, playing together in an ensemble meant that they were able to achieve together more than they had been able to on their own.

— Aspirations of learners, teachers, and parents were in many cases exceeded by what they managed to do and achieve in this teaching pilot.

— Classroom teachers in some cases were surprised by the levels of concentration and commitment that young people showed in their application to music learning.

— Although it is beyond the remit of this research, the position of these young people with regards to Whole Class Ensemble Teaching (WCET, also known as 'Wider Opportunities') would benefit from some attention from music hubs.

— Externally validated public assessment, in the form of Music Medals and other certification, works as both an incentive for pupils, and a motivating factor for them to pursue their music. However, there is still room for further work in this area with the Examination Boards.

— Although the provision for the children involved in the pilot might be seen as being differentiated from 'normal' instrumental teaching and learning modalities, nonetheless this differentiated provision enabled 7 the young people to participate in learning to play an instrument, where otherwise this would have been unlikely to be the case.

— The phrase "a spectrum of needs requires a spectrum of provision" has been used by OHMI, and this seems reasonable under these circumstances.

Gender inequality is also relevant to diverse talent development. The Keychange initiative led by PRS Foundation is an international initiative which

[20] Birmingham City University, OHMI, *Independent Evaluation of OHMI Teaching Pilot, Final Report*, February 2017

seeks to transform the future of music by encouraging festivals and music organisations to achieve a 50:50 gender balance by 2022.[21] Many UK festivals, music organisations and private businesses signed up.

However, as recognised by Youth Music, the music industry is still unrepresentative of the UK's diversity and those from disadvantaged backgrounds are more likely to miss out. Initiatives such as the Youth Music gender specific talent development #IWD2019 seek to address gender imbalance from an earlier point. This project generated this quotation from a young person involved with the music sector:[22]

> "While part of the problem is the lack of visibility and the portrayal of women in the scene, grassroots encouragement and education is key to inspiring women to get involved with an industry that might otherwise be too intimidating.

Birmingham Weekender 2015

Image © Verity Milligan / Birmingham Weekender

Asian Arts Agency - Roopa Panesar at Lincoln Centre

Image © Julia Drummond

[21] https://keychange.eu/

4. Music ecology

This chapter explores the music ecology of the Midlands, based upon the various research steps that we have completed.

4.1 Survey findings

4.1.1 Live music ecology

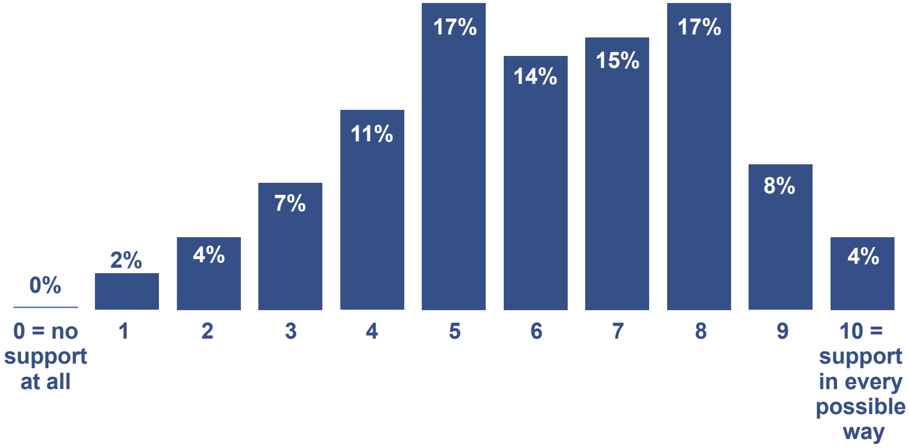
Overall, respondents are relatively positive about their locality as a place for live music. They were asked to rate their locality as a place for live music. With 0 indicating a poor place for live music and 10 indicating a world class destination for live music. 24% scored their locality somewhere between 0 and 4; compared to 58% who ranked it at 6-10. 5 and 8 were jointly the most popular responses.

When looking at ratings by local authority in which respondents are based (Figure 12), this suggests that respondents from the largest cities - Birmingham, Leicester and Nottingham - are the most positive about their locality as a place for live music.[23]

Participants from New Tricks project, run across Lincolnshire by soundLINCS 2017

Image © soundLINCS / Cliff Stanton

Figure 11 How highly respondents rate their locality as a place for live music



Source: BOP Consulting, 2019 (n= 327)

[23] Again, note that ratings for many of the Local Authorities are based on too small numbers of respondents to be considered significant.

Figure 12 How highly respondents rate their locality as a place for live music – geography of respondent/ respondent's organisation[24]

Ranking	0 (very poor)- 3	4-6	7-10 (world class)
ALL	44	139	144
Birmingham	6	17	42
Coventry	3	8	2
Derby	2	5	2
Derbyshire	2	9	3
Dudley	2	2	2
Herefordshire	2	3	
Leicester	2	6	14
Leicestershire		4	6
Lincoln	1	4	
Lincolnshire[25]	5	7	4
Northamptonshire	1	5	2
Nottingham		6	23
Nottinghamshire	1	6	9
Sandwell	3	6	3
Shropshire	1	4	4
Staffordshire	4	6	7
Stoke-on-Trent	1	4	3
Warwickshire	3	11	4
Wolverhampton		5	1
Worcestershire	4	10	7

Source: BOP Consulting, 2019 (n for ALL = 327)

Overall, 310 respondents replied when asked about the **strengths for live music in their locality.** Among these, 'a strong range of local acts performing in the area' is seen as the main strength for live music among all respondents (receiving 187 ticks, by 60% of respondents), followed by 'range of performance opportunities at different stages of the musical career' (159 ticks, by 51% of respondents).

The pattern is again similar when controlled for role, genre or geography of respondents; or indeed when controlled for demography of the predominant users of respondents' services:

— When controlled by respondents' predominant musical role, 'a strong range of local arts performing locally' was considered as the biggest strength for local live music by music teachers, Musicians/ DJs and those involved in music in the community. The results were slightly different for music managers (who gave most ticks to 'good transport links for audiences') and promoters (most ticks to 'a range of performance opportunities' and 'local promoters').[26]

— Respondents from all genres saw the same two options ticked overall as most important ('a strong range of local acts performing in the area', 'a range of performance opportunities for those at different stages of their musical career'); the same was true for respondents from the East or West Midlands (Figure 13).

[24] Please note that all Local Authorities with responses from less than five respondents were excluded from this list

[25] Except North and North East Lincolnshire

[26] Note that this is again based on very small numbers (all options received less than 10 ticks)

Figure 13 Perception of respondents on the main strengths for live music in the locality – geography of individual respondent/respondent's organisation

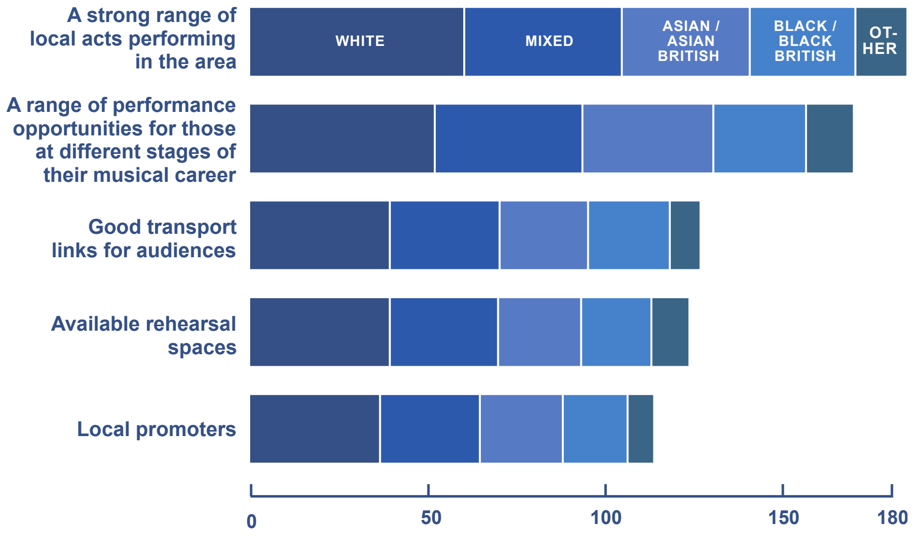
	ALL	West Midlands	East Midlands	Outside Midlands	National organisation	Left blank
A strong range of local acts performing in the area	**187**	95	88	2	2	
A range of performance opportunities for those at different stages of their musical career	**159**	85	69	3	1	1
Good transport links for audiences	**122**	75	47	1		
Available rehearsal spaces	**119**	57	58	3	1	
Local promoters	**115**	62	49	3	1	
A strong range of national acts touring to the area	**105**	56	47	1	2	
Strong local networks	**90**	41	47	2		
Strong audience base	**82**	44	37	1	1	
Marketing and Promotion	**48**	21	26	1		

support from venues						
Local booking agents	**30**	12	17	1		

Source: BOP Consulting, 2019

We asked respondents about a) the predominant demography of their service users, b) what they perceive as the strengths for live music in their locality. Figure 14 combines answers to these questions. The axis shows the number of ticks given by respondents and the colour coding indicates the relative importance of different demographic groups to respondents. As the composition of demographic groups is similar in each of the bars in Figure 14, it seems that predominant demography of service users makes little difference to perceptions of live music strengths.

Figure 14 Perception of main strengths for live music in the locality, assessed by the demography of the users of respondents' services



Source: BOP Consulting, 2019

Overall, 318 responded when asked about the **main barriers to greater vibrancy for live music in their locality**. Among these, the largest number of respondents felt this to be ‘a lack of live music venues’ (157 ticks, ticked by 49% of respondents), closely followed by a ‘lack of marketing and promotion’ (143 ticks, by 45% of respondents) and ‘lack of audiences’ (130 ticks, by 41% of respondents).

While this seems slightly contradictory given ‘available performance opportunities’ is seen as one of the biggest strengths for live music locally, the pattern is again very similar when controlled for various sub-groups:

— When controlled by respondents’ predominant musical role, ‘a lack of live music venues’ was also considered as the greatest barrier to vibrancy by Musicians/ DJs, Producers and those working in community arts. Music teachers, however, consider ‘lack of audiences’ as the biggest barrier, while slightly more promoters felt ‘lack of marketing and promotion’ is the biggest barrier.[27]

— Analysed by genre, again, respondents from all genres saw ‘lack of live music venues’ and ‘lack of marketing and promotion’ as most important.

— ‘Lack of live music venues’ and ‘lack of marketing and promotion’ were ranked the biggest two problems by respondents from the East and West Midlands (see Figure 15).

Figure 15 Perception of the main barriers to greater vibrancy for live music in the locality – geography of respondent/ respondent’s organisation

	ALL	West Midlands	East Midlands	Outside Midlands	National organisation	Left blank
Lack of live music venues	**157**	97	59	1		
Lack of marketing and promotion	**143**	83	58		1	1
Lack of audiences	**130**	75	50	3		2
Lack of promoters	**97**	54	41		2	
Lack of booking agents	**89**	51	38			
Noise related issues including new building developments	**86**	54	30	1	1	
Locality not an attractive touring location	**84**	45	36	2	1	
Poor Transport infrastructure/ links	**83**	46	34	1	1	1

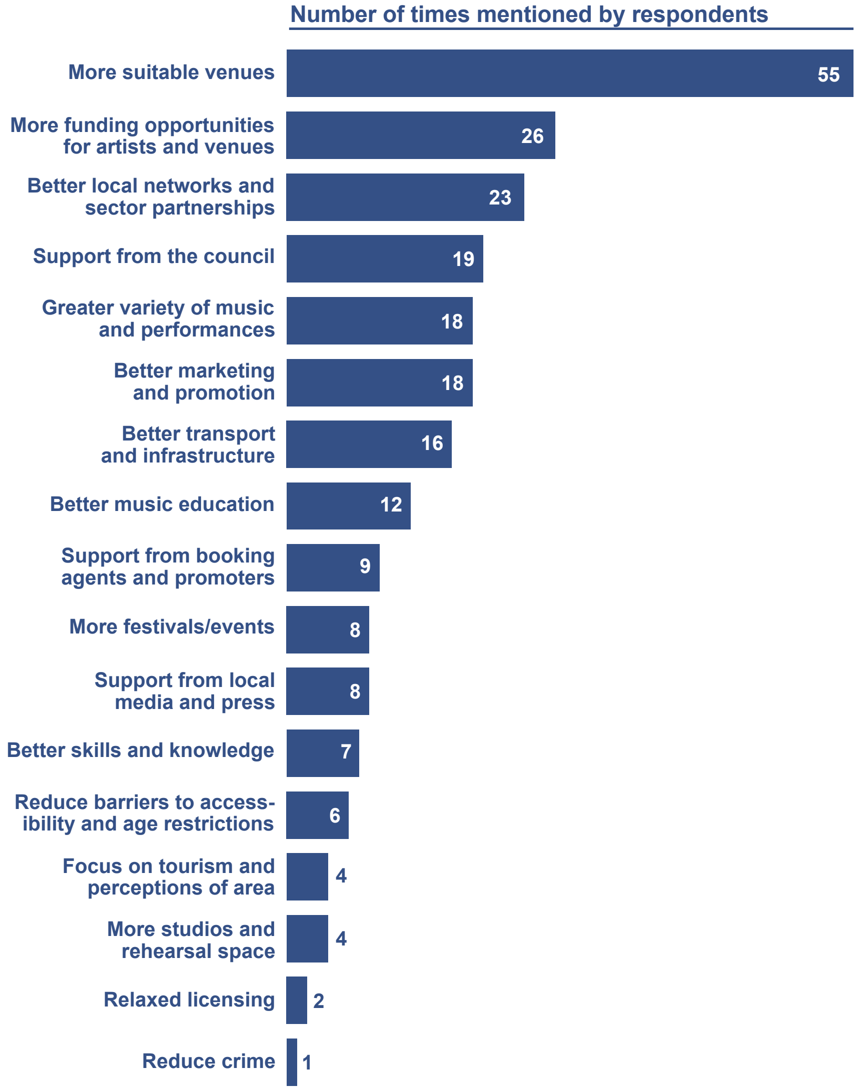
[27] Again, this is based largely on very small numbers (under 10 responses for each option among all except Musicians/ DJs and Music teachers).

Licencing issues	**67**	33	32	1	1	
Lack of rehearsal space	**65**	37	27		1	
Lack of studios	**55**	31	23	1		
Lack of bookable acts locally	**36**	19	16			1
Not applicable – no current barriers	**24**	11	13			
Lack of bookable acts nationally	**23**	11	12			

Source: BOP Consulting, 2019

Asked to comment in open text on how the local area could do better to support live music, the largest proportion of respondents overall mentioned the availability of suitable venues (see Figure 16).

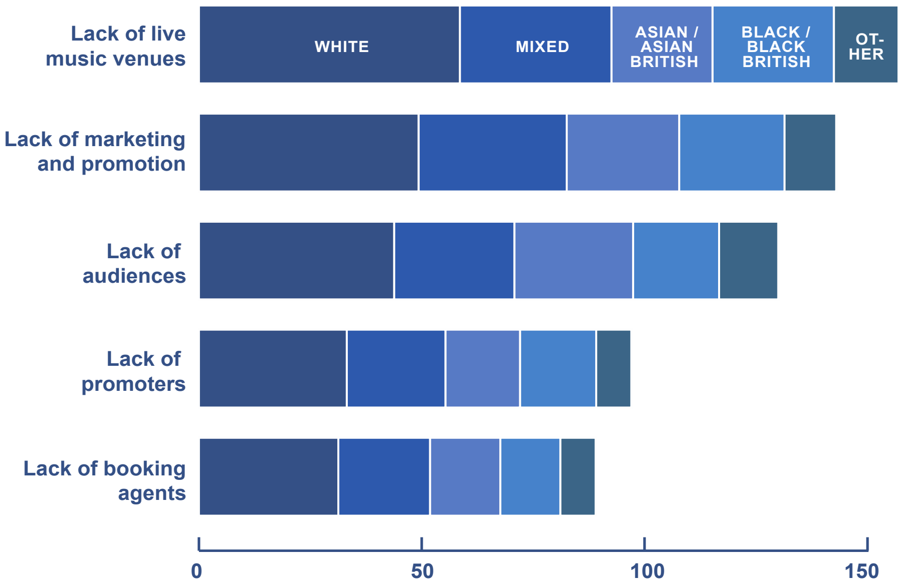
Figure 16 Respondents' comments on how their locality could better support local music (analysed open responses)



Source: BOP Consulting, 2019

We asked respondents about a) the predominant demography of their service users, b) what they perceive as the main barriers to greater vibrancy for live music in the locality. The axis in Figure 17 shows the number of ticks given by respondents and the colour coding indicates the relative importance of different demographic groups to respondents. As the composition of demographic groups is similar in each of the bars in Figure 17, it seems that predominant demography of service users makes little difference to perceptions of barriers.

Figure 17 Perception of the main barriers to greater vibrancy for live music in the locality – by demography of the predominant users of respondents' services



Source: BOP Consulting, 2019

4.1.2 Awareness and engagement with Arts Council England

Survey respondents were predominantly aware of Arts Council England - only 5% out of 426 said they were not.

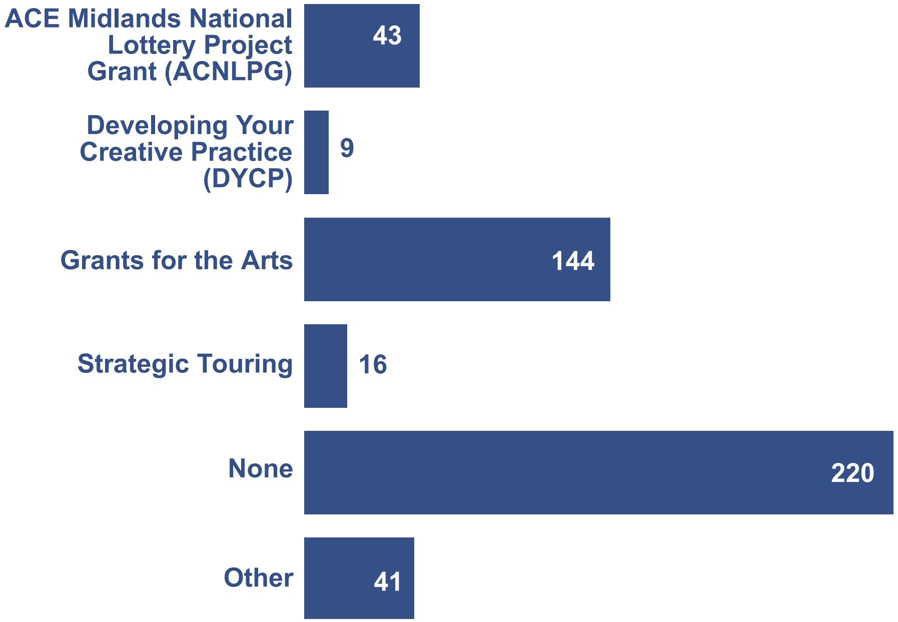
79% of respondents responded to the question of which funding sources they had previously applied for (n=384). Of these, many had applied for funding sources in the past; however, where respondents were given the option to tick all grants they had applied for, over half of all responses (220 ticks, by 57% of all respondents) went to 'none'.[28] This was followed by Grants for the Arts (114 ticks). (see Figure 18 below).

'Other' received 41 ticks. Looking at these open responses:

- 16 referred to other Arts Council England grants (13 mentioned NPO funding, 3 Capital grants, and 1 Catalyst funding)
- 4 referred to funding from Music Education Hubs
- Others mentioned local authority funding, ERDF/ European Social Fund, PRS Foundation, and local opportunities, e.g. Coventry City of Culture or Jazz West Midlands.

[28] This high proportion of respondents that have not received funding from Arts Council England may relate to the high proportion of music educators that completed the survey.

Figure 18 Arts Council England grants applied for by survey respondents

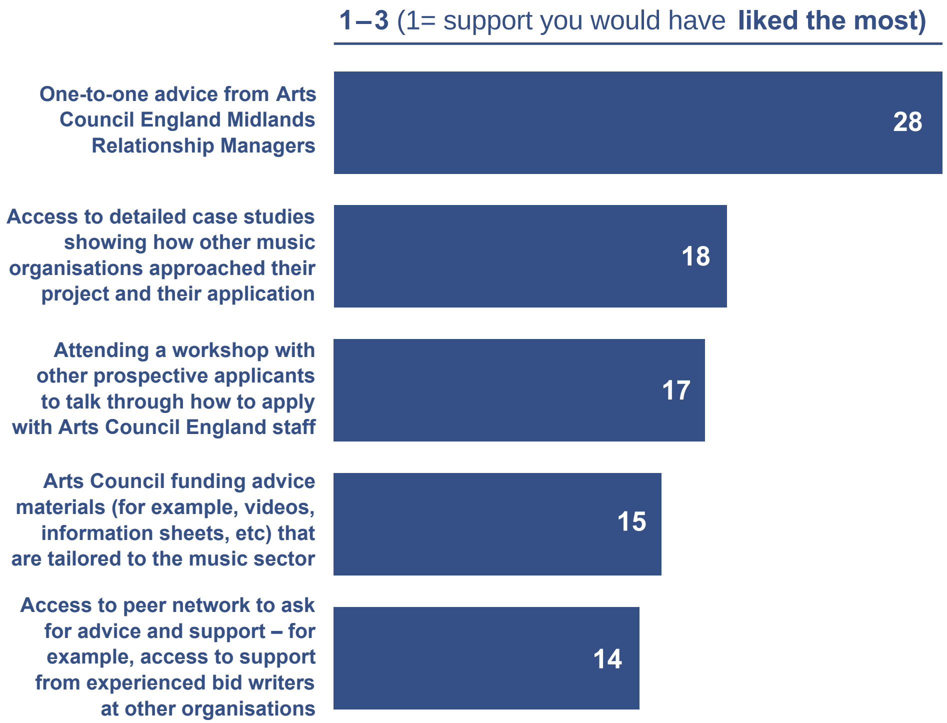


Source: BOP Consulting, 2019 (n=384)

In total, 360 respondents replied to the question of what kinds of support they associate with Arts Council England in the Midlands. Of these, 'funding' was picked out by the largest number of respondents (330 times, ticked by 92% of respondents), followed by 'advice' and 'music sector development' (ticked 148 and 143 times respectively). Comparatively few respondents associate Arts Council England in the Midlands with 'brokerage' (ticked 78 times, by 22% of respondents).

Only a small proportion of respondents replied when asked to rank the forms of support that they would have found useful prior to making their application (36, 7.4% of all respondents). Among these, 'one-to-one advice from the Arts Council England Midlands Relationship Manager' was considered by far the most valuable by the largest number of respondents. (see Figure 19)

Figure 19 Support respondents would have found useful prior to making their application, ranked from 'would have liked most' to 'least'[29]



Source: BOP Consulting, 2019 (n=36)

[29] Note that this is based on the responses of 36 respondents only

4.2 Other research

Youth Music have also undertaken research into young musicians (aged 16-25) and their experiences of applying for funding.[30] This found:

- The main barrier described by participants who took part in the research was a lack of understanding about the grant application process, specifically what a good funding application looks like, and how to go about creating one
- Fear of rejection was described as significant for people who had never applied for funding
- Some participants described not knowing how to use the money properly, having no budgeting or project management experience, they said it was hard to know where to start. There was also a concern that because of this they, or their work, would not be taken seriously
- Some participants were concerned about whether receiving a grant for a music project would affect their income assessed benefits and felt clear information would need to be provided to avoid their universal credit or housing benefit being imperilled.

4.2.1 Focus groups

The focus groups highlighted a lack of music infrastructure in the Midlands. These gaps include:

- New managers who have methods and techniques to grow artists
- Spaces to rehearse and places to perform
- Midlands radio – if this were better developed, it would create an easier pathway to audiences. Social media and streaming platforms are now key channels, with potential for some artists to better utilise
- Funding to produce quality recording, especially for emerging artists – necessary for them to attract labels of the scale required to bring them to bigger audiences
- Weak networks: Lack of coordination and join-up.

A desire was expressed for funding to address these infrastructure gaps. We consulted with our advisory group to seek to better understand this focus on funding. In response to this, we were told:

- Awareness of funding opportunities among musicians can still be low
- Easily accessible language would help to build awareness – with the PRS Foundation referred to as a funder that has made significant improvements in this respect in recent years
- Music networks might also have a role in building awareness.

We note that the case for new kinds of funding is also argued in UK Music's *Greater Manchester Music Review 2019*. In arguing for a new Talent Pipeline Fund, this recent report argues:

"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 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 terms of building audience, while the importance of more traditional channels is recognised, the advisory group stressed the new centrality of social media. An ability to deploy this is newly essential for emerging artists and can help to unlock additional financial support and opportunities. Sharing skills and experiences around these abilities may be a role for music networks – organisations that we discuss in greater detail in chapter 6.

[30] Youth Music, *Summary findings of consultation to develop Youth Music's strategy for young adults*, 2019. https://network.youthmusic.org.uk/findings-youth-musics-18-25-consultations

Birmingham Weekender 2015

Image © Andrew Fox / Birmingham Weekender

Mellow Peach at BE Festival 2014

Image © Alex Brenner / BE Festival

5. Touring

This chapter begins by placing the challenges facing touring in the Midlands in the context of the broader challenges facing live music in the Midlands. We then report upon our survey and focus group findings on touring.

5.1 Live music context

The Music Venue Trust notes numerous closures of live music venues in the Midlands in recent years including:

— The Greyhound (Nottingham)

— The Haygate (Telford)

— The Roundhouse (Birmingham)

— The Victoria Inn (Derby)

We are also aware that Birmingham has seen a plethora of environmental protection regulatory action against licensed premises as a result of noise complaints, primarily from residents in proximate residential development. Premises include, but not limited to: The Rainbow; The Spotted Dog; The Vaults; The Loft; Solomon Cutler; The Anchor; Sidewalk; Glamorous; Zaras; Beorma / Soiree Lounge; Mechu; Tunnel Club; Second City Suite; Monastery; The Nightingale and more.

While the list above provides an overview of venues in Birmingham that have experienced issues with environmental protection regulation in recent years, we are not aware of a comprehensive list of venues across the Midlands that have experienced these issues. That the live music sector is challenged, however, can seem an increasingly prevalent reality.

The Assembly in Leamington Spa, for example, closed as this research was ongoing. The company that ran the Assembly attributed this closure to rising rent and business rates along with the high costs of maintaining a listed building.

The Midlands is, therefore, not unique in having live music venues challenges. Between 2007 and 2016, London experienced a net loss of 35% of its grassroots music venues, and evidence suggests that experience has been reflected across the country.[31] More recently, however, there is evidence that this trend has been reversed in London[32] – perhaps indicating that a dedicated policy focus upon this issue can have positive impacts.

Data held and maintained by the Music Venue Trust on venue closures and openings indicates to them that the rate of venue closures in the Midlands is broadly in line with the rate of closures experienced elsewhere in the UK. However, the rate of new openings in the Midlands seems to lag elsewhere in the UK. The net impact of these rates of closures and openings in the Midlands suggests that the stock of venues in the Midlands is declining as rapidly more rapidly than elsewhere in the UK.

In 2018, five venues from the Midlands accessed the Music Venue Trust's Emergency Response service. The Emergency Response service allows any venue in crisis to get in touch with their issue and Music Venue Trust will provide guidance and support to them. London and Bristol are the only other places that rival the Midlands in their use of Emergency Response. However, particularly in the case of London, this rate of usage can be attributed to the relatively large preponderance of venues in London.

In summary, live music venues are facing significant challenges across the UK, with evidence that these challenges are at least as sharp in the Midlands as anywhere else in the UK.

The pressures on live music venues are well-documented:

— **Business rates**: In advance of April 2017, it was projected that business rates for London's grassroots music venues (GMVs) would increase 26%

[31] Digital, Culture, Media and Sport Committee, Live Music, Ninth Report of Session 2017-19

[32] London has six more grassroots music venues than it did last year, according to figures released by Mayor Sadiq Khan's office in July 2019.

from £3.21m to £4.06m and that 21 of London's 94 GMVs would be at high risk of closure due to this increase.[33]

- **Planning and development**: *"More can be done"*, it has been argued,[34] *"to recognise live music venues in planning policy and provide guidance for decision makers. When making a decision, planning officers and borough planning committees can only judge developments against statutory policies."*
- **Licensing and policing:** The paper referenced above continues: *"Licensing conditions and police requirements increase the cost of putting on live music. According to research carried out by the Music Venue Trust, there is a perception amongst venues that some licensing, environmental health and police teams assume music venues to be a cause of anti-social behaviour. In one case a venue reported over 70 separate conditions on its licence, the cost of which exceeded its annual budget for putting on new and developing artists."*

The declining viability of music venues is an international phenomenon. In the past 15 years, for example, more than 20 percent of New York City's smaller venues have closed, among them some of the industry's most prominent and revered locations.[35]

5.2 Survey findings

Overall, 41% of all respondents operated a festival, live music venue or community arts organisation (n=296).

Of these, most respondents (67%-73%) had not received any tours across all genres (contemporary/ popular music; jazz; folk; world music). The same held true when looking at the responses from those based in the East and West Midlands separately, or when looking at the responses when analysed by demography of the predominant users of respondents' services (see Figure 20, Figure 21 and Figure 22).

Of those that did receive a tour, across all genres, the largest proportion of respondents (10%-16%) received two to five tours (see Figure 20). Only very few respondents received over twenty tours, across all genres – again, this pattern also remained when analysed by geography or demography of service users (see Figure 21 and Figure 22).

Figure 20 Response to the question of how many tours respondents have been received in the past 12 months in 4 different genres

	Contemporary Popular Music	Jazz	Folk	World Music
None	94 (71%)	88 (67%)	95 (73%)	96 (73%)
One	5 (4%)	7 (5%)	10 (8%)	11 (8%)
Two – Five	20 (15%)	21 (16%)	13 (10%)	17 (13%)
Six – Ten	7 (5%)	10 (8%)	6 (5%)	5 (4%)
11 – 20	4 (3%)	1 (1%)	5 (4%)	2 (2%)
Over 20	2 (2%)	5 (4%)	1 (1%)	0 (0%)
n=	132	132	130	131

Source: BOP Consulting, 2019

Nevertheless, responses from those respondents based in the East and West Midlands show up some slight differences: in the West Midlands, the genres received most often were Jazz and Folk (with one respondent receiving Folk over 20 times); in the East Midlands, Jazz followed by Contemporary Popular

[33] Nordicity, *Analysis of the impact of business rates revaluation on grassroots music venues in London, prepared for Mayor of London,* April 2017

[34] London's Grassroots Music Venues, Rescue Plan, October 2015

[35] Boston Consulting for New York Mayor's Office of Media and Entertainment, *Economic Impact, Trends and Opportunities, Music in New York City*, 2017

music were received most often, with both being received more than 20 times by two or three respondents respectively[36] (see Figure 21).

When analysed by the demography of the predominant users of respondents' services, across all demographic groups (White, Mixed, Asian/Asian British, Black/Black British, Other), contemporary popular music and Jazz are most likely to have been booked over twenty times (see Figure 22).

Figure 21 How many tours respondents have been received in the past 12 months, by genre and geography of respondent/ respondent's organisation

	Contemporary Popular Music	Jazz	Folk	World Music
WEST MIDLANDS				
None	59	56	57	58
One – twenty	20	22	21	21
Over twenty		2	1	
n=	79	80	79	79
EAST MIDLANDS				
None	32	30	38	37
One – twenty	16	17	12	13
Over twenty	2	3		
n=	50	50	50	50

Source: BOP Consulting, 2019

Figure 22 How many tours respondents have been received in the past 12 months, by genre and demography of the predominant users of respondents' services

	Contemporary Popular Music	Jazz	Folk	World Music
WHITE				
None	51	48	55	56
One – twenty	16	17	12	11
Over twenty	1	3	1	
n=	68	68	68	67
MIXED				
None	33	37	40	39
One – twenty	11	6	7	8
Over twenty	3	4		
n=	47	47	47	47
ASIAN/ ASIAN BRITISH				
None	32	32	36	34
One – twenty	9	9	7	9
Over twenty	2	2		
n=	43	43	43	43
BLACK/ BLACK BRITISH				
None	19	24	27	26
One – twenty	10	6	4	5
Over twenty	2	1		

[36] Note that again these numbers are very small and may simply be a reflection of the particular respondents who happened to have responded to this question, as opposed to reflecting the situation in the area.

n=	31	31	31	31
OTHER				
None	15	14	15	17
One – twenty	5	6	5	3
Over twenty				
n=	20	20	20	20

Source: BOP Consulting, 2019

Touring: diverse acts, diverse audiences

There is general acknowledgement that diversity needs to improve in the touring sector of the music industry and specifically diversity of audiences. However, there is limited data available to measure any successes.

Data compiled for Arts Council England shows that there is a disproportionately high number of existing audience members at NPO organisations, across all artforms and genres, that fall into the Social Grades A, B, C1, which includes Higher Managerial, Supervisory and administrative professionals.[37] In contrast, there is a disproportionately low number of audiences from the lower income, semi-skilled and unemployed Social Grade groups. It may be that for some people attending music events is seen as more of a luxury, which they cannot always afford. However, when we look at which groups and ethnicities make up each Social Grade, it is Black and Pakistani households that are the highest groups represented in the lower Social Grades of C2, D and E, with White households making up the majority of higher Social Grades. This means certain groups and ethnicities are less likely to access music, due to their low-income status.

A key theme raised by a focus group participant was around the issue of venue licensing in relation to Black music events. They made the point that Midlands-based venues have faced pressure from Police licensing teams to not host certain types of events such as Reggae Dancehall as they are deemed to pose a high risk with regards to the audiences they attract. In London, the 696 Form – (a risk assessment form which the London Metropolitan Police requested promoters and licensees of events to complete and submit 14 days in advance of an event) became controversial due to it asking for details of ethnic groups likely to attend the performance. Strong campaigning led to the withdrawal of the use of the 696 form in 2017. While the form has never been used in the Midlands, this focus group participant argues '*the feeling that Black music events pose high risk as highlighted by the use of 696 form still exists across the UK including in the Midlands music scene*.'

The focus group participant said:

> “ Local independent promoters have faced challenges when trying to book venues. When a promoter or artist is unknown to a venue manager, they can be told they can't book the venue as they are not a recognised promoter.

It is thought that this pattern has had a greater impact on promoters of Black music genres such as Grime, Garage and Hip Hop, as mainstream venues are not as familiar with the genres, artists or promoters. The focus group participant continues, *'it has had a profound effect on Black promoters who are often left without a sufficient number of venue options to produce live music events.'*

The advisory group also note that many minority groups - LGBTQ++, Irish, Chinese, for example – face challenges, not least in relation to touring. These challenges can relate to preconceptions about the kinds of music and audience that artists from these backgrounds will produce. At the same time, however, the advisory group also acknowledge that additional support has been made available in recent years. It is important awareness of these forms of support, and how to access them, continues to be built.

[37] Arts Council England, *Equality, Diversity and the Creative Case, A Data Report 2017/18*

Attitude is Everything is an Arts Council England Sector Support Organisation that has supported the UK's live music industry to improve accessibility for Deaf and disabled people since 2000. It has helped us better understand the barriers faced by disabled people. It recently interviewed 96 artists with access requirements.

Of these 96, 1 in 5 have had to cancel shows due to physical access issues – a barrier to them touring. Other kinds of barriers that they have experienced, as well as perceptions that they hold, include:

— 38% cannot access their nearest rehearsal space

— 70% have withheld details of a health condition or impairment due to being worried that doing so will cause problems and impact a relationship with a promoter, venue, or festival

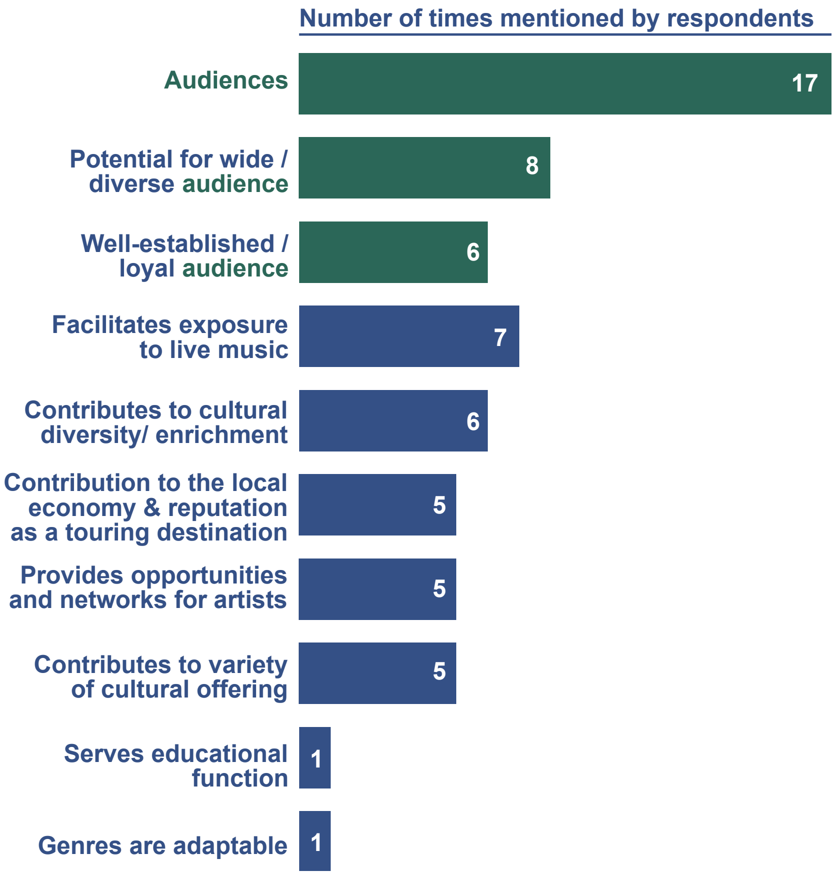
— 96% think that the industry can become more inclusive if artists with access requirements became more visible and are given the opportunity to speak out about their experiences.

Analysis of open responses

Asked about particular local strengths relating to touring, 'audiences' were mentioned most often by respondents – either in terms of the potential for a wide/ diverse audience, or in terms of the existence of a loyal audience base (see Figure 25). This finding on strength of audiences contradicts other findings from our research[38] and more genre- and geographic-specific research may be needed to unpick this.

[38] For example, earlier we report that overall 318 responded when asked about the main barriers to greater vibrancy for live music in their locality. Among these, 'lack of audiences' (130 ticks, by 41% of respondents) was the third most popular response.

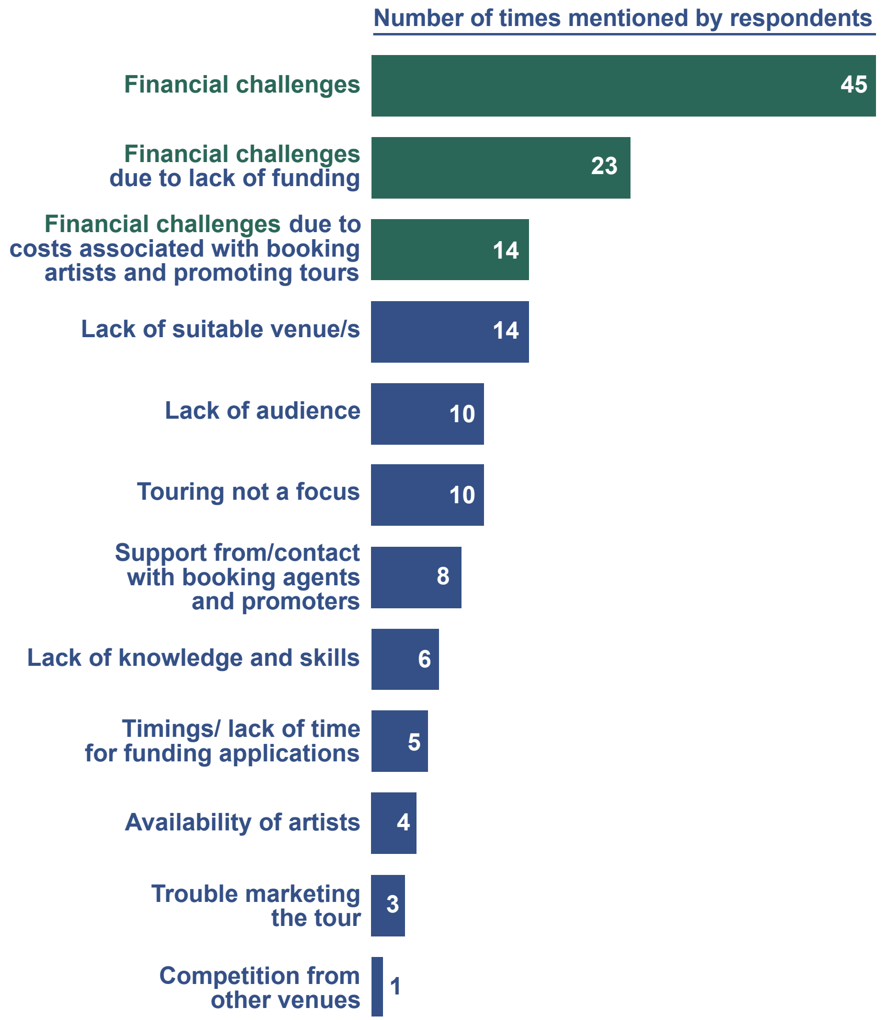
Figure 23 Perceptions of the particular strengths relating to touring that are characteristic to Contemporary Popular Music, Jazz, Folk and World Music (analysed responses to open question)



Source: BOP Consulting, 2019

Asked about the main barriers/challenges preventing respondents from booking or programming touring work, financial challenges were mentioned most often, due to either lack of funding or the costs associated with booking and promoting tours. (see Figure 24).

Figure 24 Perceptions of barriers/challenges that prevent booking/programming touring work (analysed responses to open questions)



Source: BOP Consulting, 2019

Funding was stressed in this comment from a survey respondent:

> “Funding is by far the biggest barrier for us taking our community music group on tour. We are currently working hard to set up as an incorporated not-for-profit company so that we are eligible to apply for funding from more sources however this is taking time due to a lack of business knowledge. *(respondent from a Birmingham-based community arts organisation working in the folk, experimental and pop genres)*

Some venues lack capacity for touring acts, according to this comment from a survey respondent:

> “Our venue is currently under development however going forward the main barriers/challenges would be size of venue. Seating capacity too small for a lot of touring acts. *(respondent from a Staffordshire-based live music venue working in the brass bands, choral and pop genres)*

The comment below from a survey respondent indicates that a lack of demand for certain kinds of music in certain places is an issue:

> “There is only a very small market for Jazz in this location. It is not well supported. Therefore, venues don't want it because audiences’ attendance are poor. *(respondent a Leicestershire-based musician/DJ working in the blues genre)*

Other comments highlight some advantages of taking touring work:

> “Receiving national tours is like having a calling card for the venue on print that is seen around the country. Many [folk] tour bookers look at where others are going and build on strong areas. *(respondent from a Derby-based live music venue working in the genres of folk, pop and world music)*

> “ [These genres bring] diverse cultural experiences for a local audience (in an area where the population is 96% white British). Live events strengthen community involvement across the board. *(respondent from a Derbyshire-based community arts organisation working in the genres of media arts, pop and visual art/ sound art)*

5.3 Other research

5.3.1 Focus groups

The focus groups identified issues related both to live music in general and to touring specifically.

Issues around live music raised at the focus groups were:

— Business rates and licensing issues. It is thought very hard to make such venues economically viable. There have been venue closures and a reduction in spaces to rehearse – particularly for young people. Support in-kind (e.g. local council lending minibus) has also declined

— There are gaps in the venue ladder in some localities (e.g. large and small venues but little in the middle, which artists of certain scales would benefit from)

— Habits are changing in ways that challenge live music – people spending more time online and at home.

Issues specific to touring raised at the focus groups:

- Sourcing local talent is becoming more important because of the financial pressure to lower the cost per show
- Specifically, relating to rural touring, important to get the artists understand what rural touring means – in terms of timeframe and equipment, etc
- Those organising tours often want to plan them a long time ahead (e.g. a year) but artists can struggle to commit that far ahead
- Desirability of having a stronger network to tap into to contact bands and build trust with other collaborators
- Tour management is a specific skill, lacking within urban music scene – where acts need to be relatively big to sustain tours.

White Peacock by Gill Brigg and Nottingham Playhouse

Image © Nottingham Playhouse / Robert Day

White Peacock by Gill Brigg and Nottingham Playhouse

Image © Nottingham Playhouse / Robert Day

6. Music networks

"Clearly", it has been noted elsewhere,[39] *"young people should not be underestimated in their ability to come up with practical, creative and musical ideas for what provision could look like for themselves and/or their peers."* They do need, however, structures within which these talents can be best developed – as can older musicians. Music networks may form part of these structures.

The value of music networks has been experienced elsewhere. One of their benefits, for example, can be to build trust between the music sector and other agencies. *"When working to develop and implement music-related policies,"* according to a Canadian study, *"one of the most common barriers identified by city officials is the potential for pushback from the music community. Two of the most effective ways to avoid these pitfalls is through stronger community and stakeholder engagement*".[40]

Music networks already exist in the Midlands. We begin this chapter by reviewing these. We then review some examples of networks elsewhere. Looking ahead to how networks might develop in the Midlands, we present relevant findings from our survey and focus groups.

6.1 Music networks in the Midlands

For the purposes of this report, we define music networks in the Midlands as those who meet in a physical space, or are representative bodies, whose intension is to foster connections and development between music sector individuals, organisations and strategic policy organisations. We have not included online communities that communicate via social media platforms.

In the figure below, we provide an overview of such music networks in the Midlands. While there is some overlap between these categories, this overview is organised into:

- Genre-based music networks – with a concentration on those genres covered by this research (contemporary, folk, jazz, and world music)
- Place-based networks
- Sub-sector focused networks

In terms of genre-based networks, these seem somewhat better developed in the Midlands in jazz and world than contemporary and folk – albeit folk has a strong national network (English Folk Dance and Song Society), which perhaps limits the necessity of forming distinct folk networks outside of this organisation.

East Midlands Jazz Network are working with the West Midlands Jazz Network to improve the way the genre is organised across the whole region. The West Midlands World Music Consortium has recently launched. World music lacks an equivalent network in the East Midlands. Extending the geographic coverage of world music networks in the Midlands might be a sensible ambition. Equally, the jazz networks are better established and there is a crossover between the genres of jazz and world music; therefore, another kind of ambition for world music might be to find some way to productively work more closely with the jazz networks.

Place-based networks seem more prominent in the West Midlands than the East Midlands, especially in Birmingham and Coventry. The Birmingham Music Coalition, for example, is working with music industry businesses and organisations across that city to develop a sector body that talks to one another and works nationally and internationally to represent the sector to policy makers, broadcast media and the wider music industry. This format might be replicated elsewhere in the Midlands.

[39] East Midlands Talented Young Musicians Report written by Hand on Heart Arts Limited on behalf of East Midlands Education Hubs and the Mighty Creatives, East Midlands Bridge Organisation

[40] Music Canada, *Keys to a Music City: Examining the Merits of Music Offices, Boards, and Night Mayors,* 2015

There is increasing interest in these kinds of approaches. For example, the Department of Digital, Culture, Media and Sport recently published its report of its inquiry into Live Music in the UK and suggested the, "*establishment of regional 'Music Boards' comprising representatives from the music industry, policymakers and other relevant stakeholders to advocate for the live music sector and promote its interests in planning and policy decisions*".[41]

Figure 25 Music networks in the Midlands by type

Type of network	Existing networks in the Midlands
Genre-based networks	**Jazz networks** – East Midlands Jazz Network, West Midlands Jazz Network
	World Music network – West Midlands Music Consortium
	Other genre-based networks – Indian Music Coventry, West Midlands Synth Network
Place-based networks	**Birmingham** networks – Birmingham Music Coalition, Birmingham Music Network, Birmingham Music Awards, Birmingham Queer LGBTQ+++ Jam, Birmingham Musicians & Producers Meetup, CUBE (music business networking)
	Coventry networks – Coventry Music Network, Coventry Singer Songwriters
	Other place-based networks – Leamington Spa Home Made Electronic Music Society, Women in Music in Nottingham
Subsector-focused networks	Festivals – Birmingham Festivals
	Managers – The Music Managers Forum (MMF) organise a meet-up in Birmingham
	Music Services – Music Education Hub Networks – West Midlands Music, MEHEM (Music Education Hubs East Midlands)

Source: BOP Consulting, 2019

6.2 Music networks outside the Midlands

Here we discuss some examples of networks outside of the Midlands.

Greater Manchester Music Review

There are numerous city music initiatives across the UK. Examples include Sheffield, Cardiff, Leeds, Liverpool and Manchester, the last two being City-Region initiatives.

Greater Manchester's music review is being led by the Mayor's office and UK Music and was initiated to 'see how the city-region's thriving scene can be nurtured, encouraged and refreshed'.[42]

There seem to be similarities between the opportunities and challenges for music in Greater Manchester and the Midlands. This is illustrated by some of the issues raised in responses to the consultation run by the Greater Manchester Music Review:[43]

— More organised meetings/networking between industry partners

— Centralised advice and encouragement – e.g. on applying for funding

— Lack of affordable practise rooms and community-run venues

— More opportunities to discover new spaces and venues, including networking events, which also encourage new career musicians with funding and grants

[41] https://publications.parliament.uk/pa/cm201719/cmselect/cmcumeds/733/733.pdf

[42] https://www.greatermanchester-ca.gov.uk/what-we-do/culture/greater-manchester-music-review/

[43] https://www.gmconsult.org/business-innovation-and-enterprise/review_musicians/consultation/published_select_respondent

- Whilst there are numerous independent labels and studios across the city, many of them remain unknown to artists new to the scene due to lack of promotion and advertising, which is often due to a lack of appropriate funds and schemes available to the labels and studios themselves.

Following this, UK Music's Greater Manchester Music Review 2019 has recommended more opportunities for inclusive networking:

"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."

Cornwall Music Network

While the Midlands is a region, there tend to be more networks at the geographic level of cities than regions. Something of an exception to this is the Cornwall Music Network. Like many parts of the Midlands, Cornwall is largely rural and, like the Midlands, covers a large geography. Nonetheless, perhaps assisted by a relatively strong sense of county identity, Cornwall sustains an effective music network over this geography. Whether the Midlands shares a sense of identity as strong as Cornwall might be debated, and the Midlands also contains cities that might more effectively sustain music networks at these city levels, Cornwall provides a possible inspiration for a Midlands music network.

[44] https://www.cornwallmusic.co.uk/about-the-cornwall-music-forum/

The Cornwall Music Network (CMN)[44] is supported by a wide array of organisations including Arts Council England, CMN is aligned with the Creative Kernow Charity. CMN exits to '*inspire, support, connect & promote music in Cornwall & the Isles of Scilly*'. It employs a part-time project manager who is supported by an Advisory Board made up of musicians from different sectors, music businesses, music educators and music organisations

CMN works towards its aims by:

- Hosting networking events
- Promoting and encouraging skills and development across the sector
- Providing sector leadership and advocacy
- Hosting seminars, surgeries and mentoring schemes in response to sector needs
- Promote and assist in the export of music from Cornwall
- Developing the Cornish music industry infrastructure, and
- Encouraging greater inward investment into the region's music sector.

CMN has a music events calendar for the year. This allows users to see what is on, links to artist information, and links to buy tickets. There is also a guide to music festivals in Cornwall, the South West and the UK.

In addition, there is also a directory on the CMN site, with links to artists, venues, businesses, music education, production education and Cornish music. Each section provides a brief profile and links to websites, social media and contact details. However, not all details on this directory appear up to date, suggesting the need for such a resource to be maintained on an ongoing basis.

Off Axis

Off Axis is a contemporary music network focused on developing alternative touring opportunities for musicians in order to help bands to connect and build audiences and networks across the UK.[45] Our survey and focus groups

[45] http://www.offaxisnetwork.com

identified funding as a barrier to sustaining touring networks, especially in relatively rural places, which form large parts of the Midlands. Off Axis is a model that potentially allows peer-to-peer collaboration to overcome hurdles involved with limited funding.

Based in Manchester but with ‘Off Axis Ambassadors’ across the country, Off Axis is building capacity that is enabling bands to:

— Build tours and new audiences

— Swap gigs

— Appear on the Off Axis stage at the Kendall Calling Festival.

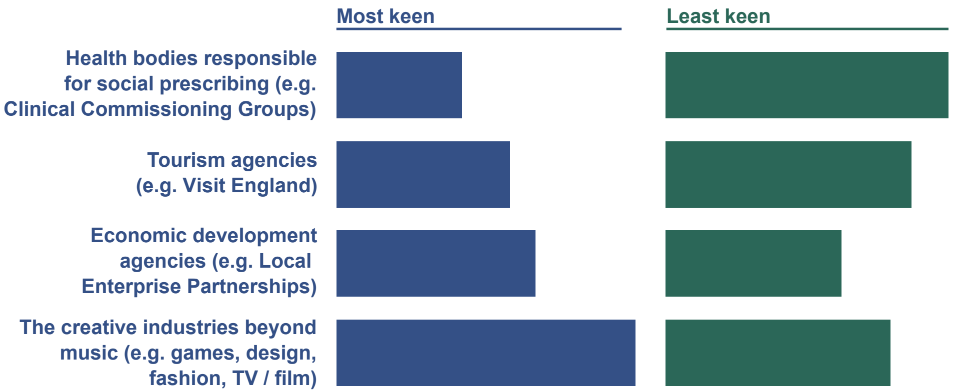
The system connects artists, allowing them to host one another at gigs in their respective hometowns - solving the problem of finding meaningful and well attended shows in other towns and cities. In exchange, hosts receive credits which can then be used in other Off Axis cities. There are no costs or fees involved at all with using Off Axis.

6.3 Survey findings

The membership body that most respondents are members of is *PRS for Music* (122 responses) followed by the Musicians Union (119 responses) and PPL (80 responses). The next highest number of responses was for the Youth Music Network, with 39 responses.

In terms of which types of organisations survey respondents would like to form new or stronger partnerships with, ‘creative industries beyond music’ received most interest (i.e. ranked ‘1 = most keen’ 69 times), while health bodies received least interest (ranked ‘1’ 29 times and ‘5’ 66 times) (see Figure 26).

Figure 26 Types of organisations with whom survey respondents would like to form new or stronger partnerships



Source: BOP Consulting, 2019 (n=284)

Some comments made by survey respondents also illustrate some potential advantages of music networks:

> “ If there was a central development / co-ordination role, that could help to drive the venues, audiences, and artists together in terms of collaboration and mutual support.

Networks might also build local research capacity to help meet this challenge:

> “ Venue owners always seem wary of getting an audience. Figuring out how to get audiences out of the house will help, as well as basic infrastructure for the industry.

Networks might advocate for public policy challenges that would support the music sector:

> "A better transport network will facilitate the mobility of audiences to concerts, performances, etc-that will help developing wider audiences.

6.4 Focus groups

The focus groups acknowledged that networks might have the potential to address some of the challenges that they identified in respect of talent development, music ecology, and touring. For example:

— Desirability of having a stronger network to tap into to contact bands and build trust with other collaborators

— Mechanisms for live venues to collaborate, rather than simply compete

— Need more managers and other support services to musicians and these to be better connected within sector

Some factors were suggested as being required for networks to be successful:

— Clear purpose

— Conceived and driven by members of network, rather than imposed upon them

Rather than a network, it was also argued that role models and ambassadors may achieve more – akin, for example, to the Future Bubblers programme.

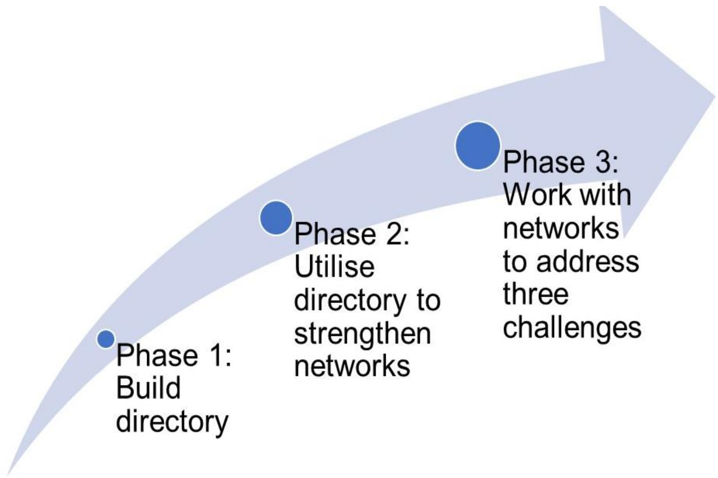
Nottingham Mela

Image © New Art Exchange / Bartosz Kali

7. Summary and recommendations

It may be that a phased approach would allow the Midlands to respond effectively to the challenges identified in this report. This approach is illustrated in the figure below and involves distinct roles for Arts Council England and the music sector in the region.

Figure 27 Recommendations in phased approach



Source: BOP Consulting, 2019

7.1.1 Build directory

As part of this research, we sought to build a public directory of organisations and individuals working in the Midlands' music sector, to facilitate cross-sector contact and collaboration. It is intended that the directory will include contact details and basic information on entrants' activity. It will sit on Arts Council England's website for a period of 6 months, accessible to the general public.

The main purpose of the directory is to enable people working in the music sector in the Midlands to learn about other individuals/organisations operating in the area. Arts Council England hope it will provide opportunities for networking and aid the development of new partnerships.

While we are grateful for having received over 140 responses to our call to appear on this directory, we feel there is scope for this response to be increased. This is because respondents were asked to complete the directory after completing the survey and may have been suffering 'survey fatigue' by that stage.

It is, therefore, suggested that the Midlands music sector be given another opportunity to enter their details on to the directory when this report is launched.

Beyond that, this directory should be hosted and managed on an ongoing basis, in such a way as to engage as many within the music sector as possible, including traditionally under-represented groups.

7.1.2 Utilise directory to strengthen networks

Networks can be part of the solution to addressing the challenges identified in this report in relation to talent development, music ecology and touring – but they need support and facilitation, as well as clear purpose driven by the members of the network.

Networks could also seek to ensure that the Midlands is appropriately represented in schemes and approaches of national NPOs and funders beyond Arts Council England. At the same time, Arts Council England can act as a broker and advocate for the Midlands music sector – with schemes like the Accelerator Programme for Music Managers[46] and Future Bubblers being opportunities for this.

[46] This is run by the Music Managers Forum (MMF), in partnership with YouTube Music.

This would be best achieved by building upon existing networks and good practice within the Midlands. The directory will provide a publicly accessible overview of these network – allowing new connections to be made and these networks to be further strengthened.

In respect of the current regional landscape of networks within the 4 genres assessed here:

- **Jazz**: An existing network in East Midlands, one being developed in West Midlands, the networks in East and West will work together when this makes sense.
- **World Music**: A network is being developed in West Midlands, less coverage in East Midlands, and potential scope for further synergies/collaboration between jazz and world music networks.
- **Folk**: Strong national network (English Folk and Dance Society) and important to seek to ensure that as much of its activities occur in the Midlands as possible.
- **Contemporary pop** is very broad category – needs to be further broken down to be meaningful. In future, it would be desirable to have a more granular categorisation.

Our research has also indicated that networks are more prevalent in the West Midlands than the East Midlands. It is possible that there are more informal networks operating across the region, but which have limited public visibility and have not been identified within any of the various research strands of this project.

Providing another opportunity to register on the directory is a further chance for these informal networks to be surfaced. For this opportunity to be seized, it is likely that the communications around the directory will need to present the ‘offer’ to the music sector in a way that is as compelling as possible. This will need to overcome any potential suspicions that the directory replicates the benefits of other databases or mailing lists.

Strengthened networks may also create a mechanism for raising awareness of barriers faced by minority groups and ways to address these barriers. Similarly, the awareness of this research to issues facing disabled artists was assisted by *Attitude is Everything* serving on our advisory group. Having musicians from diverse background serve on music networks will help to make music more inclusive.

7.1.3 Work with networks to address three challenges

In total, 360 respondents replied to the question of what kinds of support they associate with Arts Council England in the Midlands. Of these, ‘funding’ was picked out by the largest number of respondents (330 times, ticked by 92% of respondents). Comparatively few respondents associate Arts Council England in the Midlands with ‘brokerage’ (ticked 78 times, by 22% of respondents).

The directory and networks offer Arts Council England new opportunities to extend their brokerage function. In the first instance by inviting the music sector to appear on the directory, Arts Council England is brokering a situation in which there is potential for more connections and partnerships to be made within the music sector of the Midlands. There may be scope for Arts Council England to play a more active brokerage function than this – for example, facilitating the sharing of best practice between those genres and geographies relatively well served by networks and those less well served.

This brokerage is only likely to be productive, however, where the sector is keen for it to occur. The purpose of networks must be driven by the music sector itself, rather than Arts Council England.

There is, therefore, a delicate balance to be struck between Arts Council England brokerage and networks advancing themselves through the cultivation and projection of a purpose that they have clearly defined and articulated for themselves. If this balance can be struck, it seems likely that it would be beneficial to Arts Council England and the music sector.

We have surveyed the music sector on the kind of support that it would most value prior to submitting funding applications to Arts Council England. This revealed that ‘one-to-one advice from the Arts Council England Midlands Relationship Manager’ is the most valued form of support.

Networks have the potential to assist Relationship Managers in making the most of their time resource – identifying individuals or organisations with potential, including among diverse groups, and making it easier to convene knowledge-sharing sessions for those facing similar barriers to fulfilling this potential.

At one focus group it was argued that role models and ambassadors (e.g. Future Bubblers programme) may achieve more than the existence of networks. While this is something to consider, networks and models/ambassadors can be complementary ideas – with the networks facilitating forums for models/ambassadors. These models/ambassadors may be important in supporting diverse talent.

Support for such talent may be part of the purpose of music networks in the Midlands. While it is vital that networks develop and drive their own purpose, it is possible to imagine strengthened networks better addressing the three challenges assessed in this report:

— In terms of barriers to the development of talent, 'lack of access to funding' is the barrier most frequently indicated by survey respondents, following by 'lack of progression opportunities'. Stronger networks might seek to better articulate to Arts Council England and other funders the kinds of funding that would more effectively develop talent.

— 'A lack of live music venues' closely followed by a 'lack of marketing and promotion' and 'lack of audiences' were most frequently cited barriers to live music vibrancy. Again, stronger networks may be able to improve understanding of these issues for Arts Council England and other funders.

— Asked about the main barriers/challenges preventing respondents from booking or programming touring work, financial challenges were mentioned most often, due to lack of funding or the costs associated with booking or promoting tours. While some funding is available to help with these issues, networks might be able to assist in signposting this funding.

Networks could be relevant to these barriers in other senses:

— **Music education and the music sector**: Networks can help to improve the development of talent development:
  - Strengthening links between music education and the music sector;
  - Highlighting progression routes and career opportunities;
  - Music Education Hubs could play a key role in this and should engage with industry partners, as well as ensuring a strong offer for children and young people.

— **Funding**: Ability to access funding is frequently cited across each of the three challenges but networks might assist by:
  - Spreading expertise on accessing existing funding opportunities and helping organisations work together to develop more compelling funding propositions;
  - Spreading other kinds of expertise such that music organisations become less dependent upon funding (e.g. expertise in marketing and audience building);
  - Advocating for the music sector such that new kinds of funding opportunities become available. There are, for example, many kinds of economic and social challenges, which can attract public funding, that music might make itself potentially relevant to (e.g. the future of high streets).[47] The challenge is being able to present music as part of the solution to these challenges – with networks being potentially key to this presentation.

— **Preserving live music venues**: In response to the pressures upon live music venues, the range of powers that public authorities can utilise to preserve such venues is steadily increasing. Last year, for example, the National Planning Policy Framework (NPPF) was amended to introduce

[47] The £675 million Future High Streets Fund is intended to help local leaders to reinvent their town centres. Successful towns will now receive up to £150,000 of new funding to work up detailed project proposals, based on their initial plans. Places in the Midlands to be covered by this are Derby, Erdington, High Peak, Kidderminster, Nottingham, Walsall and Wolverhampton.

'agent of change' powers. Awareness of this, however, remains limited. There is a role for networks in increasing this awareness, as well as advocating on behalf of the music sector more generally on licensing and planning issues.

— **Raising awareness of opportunities**: Off Axis is an example of a network increasing awareness of touring opportunities. Within the Midlands, our consultation suggests that awareness of music opportunities more generally can be limited. The Cornwall Music Network (CAM) is an example of how networks can build this awareness – with a directory forming part of CAM's activities.

— **Partnership working to capitalise on strategic or place-based opportunities:** Connecting organisations and individuals in ways that might lead to further partnerships and opportunities. This might include developing strategic approaches to Midlands specific issues or capitalising on opportunities such as the Birmingham 2022 Commonwealth Games, City of Culture 2021, Coventry, or attracting national or international music events to take place in the Midlands. Other opportunities could include developing alignment with wider government or commercial initiatives such as Local Industrial Strategies, the West Midlands Combined Authority (WMCA) screen body, HS2, local capital developments and other creative industries sectors, such as gaming. Networks could also help to develop music specific approaches such as Music Cities or Night Time Economy initiatives.

In launching the Supporting Grassroots Live Music Fund, Arts Council England can be seen to address two of these barriers: funding and preserving live music venues. From 13 May 2019 until 31 March 2020 Arts Council England are making an additional ring-fenced budget of £1.5 million available within Arts Council National Lottery Project Grants specifically to support the grassroots music sector.[48] This funding is available to those whose main function is to host and/or promote live music events in venues. Usually, this will be venues and promoters (or groups of venues and/or promoters).

When asked for funding priorities, it is perhaps inevitable that consultees will reference to activities relevant to their own musical endeavours. It is challenging, therefore, to secure a dispassionate assessment of funding priorities. Nonetheless, difficulty in accessing and sustaining live music venues has been a consistent theme of this research. It is impossible to refine musical talent, build creative energy, and enjoy a thriving music scene without live music venues. They are an indispensable cog in the music ecosystem. In seeking to support them, the Supporting Grassroots Live Music Fund appears, consequently, well-targeted upon a funding priority.

While the focus upon funding within our survey responses and focus groups may be little surprise, members of the advisory group also suggested:

— Awareness of funding opportunities among musicians can still be low

— Easily accessible language would help to build awareness

— Music networks might also have a role in building awareness – both to funding opportunities within the sector and to the sector by Arts Council England.

The Supporting Grassroots Live Music Fund does seem to address some of the challenges identified by this research but these pointers, as well as the building up of music networks within the Midlands, may allow Arts Council England to further do so.

The Arts Council England 10-year strategy consultation is an opportunity for the sector to help influence the next 10 years of investment and support. The second consultation on the draft strategy 2020-30 runs from 1 July 2019 to 23 September 2019. While the consultation is open for anyone to contribute to, submissions from those working in the music sector are particularly welcomed.

[48] https://www.artscouncil.org.uk/funding/project-grants-supporting-grassroots-live-music#section-1

Kinde at ArtReach Journeys Festival, Leicester

Image © ArtReach

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