



WISH YOU WERE HERE

2015

MUSIC TOURISM'S CONTRIBUTION
TO THE UK ECONOMY





Cover photo credit | Callum Baker Photography / Isle of Wight Festival

Photo credit | Polly Thomas | Green Man Festival

Wish You Were Here is created on behalf of UK Music and its members to highlight the contribution of music tourism to the UK economy.

2015 is the second edition of the report, which was first published in 2013.

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



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- Live Nation
- The National Arenas Association (NAA)
- *PRS for Music*
- Sage Gateshead
- See Tickets
- Symphony Hall, Birmingham
- Theatre Royal Concert Hall, Nottingham
- Ticket Factory
- Ticketmaster

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

The analysis was carried out by Oxford Economics and a methodological statement is to be found on the UK Music website. The project is managed by Jonathan Todd, Chief Economist at BOP Consulting, on behalf of UK Music. This report is designed and printed by AudienceNet.

In addition, we are grateful to Professor Martin Cloonan of the University of Glasgow and Professor Simon Frith of the University of Edinburgh who kindly peer reviewed the methodology deployed by Oxford Economics.

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MUSIC TOURISM BY NUMBERS 2014

£3.1 BILLION

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

£1.9 BILLION

Amount spent directly by music tourists

9.5 MILLION

Number of music tourists

45%

Proportion of live music audiences that are music tourists

39%

Increase in number of overseas music tourists visiting the UK between 2011-2014

546,000

Number of overseas music tourists visiting the UK

£751

Average spend by overseas music tourists whilst in the UK

38,238

Number of full time jobs sustained by music tourism

FOREWORD



PAUL LATHAM

Chief Operating Officer, Live Nation, UK & Ireland;
Chairman, Creative & Cultural Skills;
Chairman, UK Live Music Group

I've never known live music to be as popular as it is today. In the olden days, tens of thousands of people joined communities in factories and in church. Today, music creates a primal meeting of similar minded people. The political world searches desperately for something the music industry does on a daily basis; to engage tens of millions of young people in emotion and outlook.

The primal force of music unlocks the inner soul. Whether you get together in a concert hall, a field or a pub, you feel at one with the rest of the audience.

And this force of music has created a big business. The aim of this report is to translate the sale of a ticket to the value of the live music industry to the UK economy.

Tourists spend a fortune when they physically follow their musical hearts. Overseas tourism is particularly potent when fans choose the UK as their destination for a festival or gig.

Music tourism is an activity that policy makers have only recently recognised. It is incredibly important to show Whitehall some statistics and give them the figures for the actual value live music has in every part of the UK. I'm especially pleased with the timing of this report as we are publishing it to coincide with the arrival of a new batch of Westminster's finest MPs. Just check your own region and see what music does for your constituents and your local economy.

The UK's music industry has begun to cultivate a captivating economic story

for the country. It is important to get the numbers in place. When Clinton said: "It's the economy, stupid" he was right. We need these figures for conversations with our political masters. Music is a passion and a force and it creates an economic story that should engage policymakers, not just for the success in the UK but as one of our most acclaimed and profitable global export assets.

This report brings more positivity for the industry and shows another increase in economic contribution with a staggering £3 Billion of direct and indirect spending generated by music tourism in 2014.

38,238 jobs were sustained in the UK last year alone through music tourism and over the years covered by our research data, employment figures have risen dramatically during that period, from 24,251 in 2012.

Many of these jobs might only be temporary or short term, but some of them will be filled by young kids who might be getting their first break in the music business. They might get a taste for the business and approach one of our colleges to train up, possibly with an apprenticeship through the UK Music Skills Academy.

The other figure that stood out for me was that overseas travellers shelled out nearly a grand when they camped out at a festival as part of their stay.

Many would think a slab of Tuborg lager would be one of the biggest expenditures, but with foreign visitors spending £922 at festivals and domestic travellers shelling out £438 that's

significant cash being pumped into parts of the UK economy that are probably desperate for a boost right now.

I would also like to examine the relationship of live music with the recorded sector. For a long while, the live music part of the business was never considered part of the industry. In the last few years, this has definitely changed. The music industry's ecosystem is now dependent on every part being successful.

The formation of UK Music has given the whole industry a forum for the first time. We sit around a table and we talk. We talk about our investment in the talent that leads to British music being a global success story for this country.

The value chain between and within the industry is clear to everyone at UK Music. I wouldn't give away a ticket for my gig. Recorded music should not be taken for free. The devaluation of recorded music impacts on the live industry as much as it does the artist, musician, record label or publisher. We should, and we are, working together to ensure policy makers understand this value chain and offer us policies that support our business.

The key for our success is the link between recorded and the record industry being able to fund the live acts going through the journey from bedroom to stadium. You can't just turn up and make it happen. The balance of success is getting funding, getting good, getting played, selling music and selling tickets.

UK MUSIC COMMENTARY:

MUSIC TOURISM IN THE UK 2011-2014

Music tourism within the UK increased by 34% from 2011 to 2014. Tourist numbers increased from 7.1 million to 9.5 million, whilst the number of overseas music tourists increased by 39% during that time. The direct and indirect spend generated by music tourists increased by 24% from £2.5bn to £3.1 bn. Over the same period, the UK economy grew by 4.9%.

This astounding growth in music tourism, and the amount of money spent, should force policy makers to sit up and take notice. *Wish You Were Here 2015* is irrefutable proof that British music has been a driver for economic recovery from 2011 through to 2014. Bands playing in muddy fields and concert halls around the UK have not only been adding to happiness and wellbeing, but have been driving wealth into recovering local economies across the whole of the UK.

There is compelling evidence backed by equally impressive statistics that show other areas of British music culture and its rich and diverse heritage are attracting huge numbers of domestic visitors and international tourists every year.

For visitors to the UK, music offers both experiences and those rare goose-bump moments that will continue to attract fans as tourists for years to come. The legendary Abbey Road recording studios in North-West London attracts an annual pilgrimage from 300,000 music fans to walk across its zebra crossing, making it one of the capitals most loved music destinations.

UK Music's *Imagine* report, published in 2014 found that music heritage tourism could add £4bn to the UK economy annually if it were developed across the UK to the same degree as it has been in Liverpool. Hull, which will become the City of Culture in 2017 boasts the only museum dedicated to night clubbing and was home to David Bowie's backing band, the Spiders from Mars. Hull is likely to see an influx of visitors to savour its rich musical heritage, which will boost its local economy

Over the coming pages, this report further details the impact of music tourism in each geographical area of the UK, whilst also highlighting examples of some the regional successes that are helping to drive this growth.



JO DIPPLE, CHIEF EXECUTIVE OF UK MUSIC SAID:

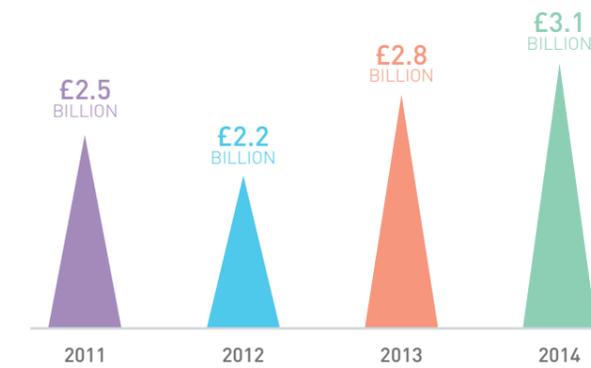
"The number of music tourists increased from 7.1 million in 2011 to 9.5 million in 2014. The amount spent on festivals and concerts, on accommodation, tickets, food and beverages, and merchandise, increased from £1.5bn in 2011 to £1.9bn in 2014. These strong statistics show how tourism is a bedrock of British music and the wider economy. Music is putting the GREAT in Great Britain."



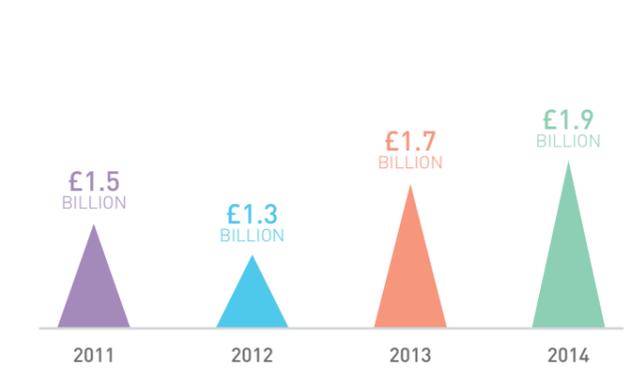
ANDY HEATH, CHAIRMAN OF UK MUSIC SAID:

"The proportion of live audiences that are music tourists increased from 42% in 2011 to 45% in 2015. More international music tourists are coming to the UK and more Brits are travelling further afield to gigs. The average spend by international music tourists has increased by 13% in this period, while total UK exports have grown by less than 2%. If we want an export-led recovery, we need music tourists to keep coming to the UK."

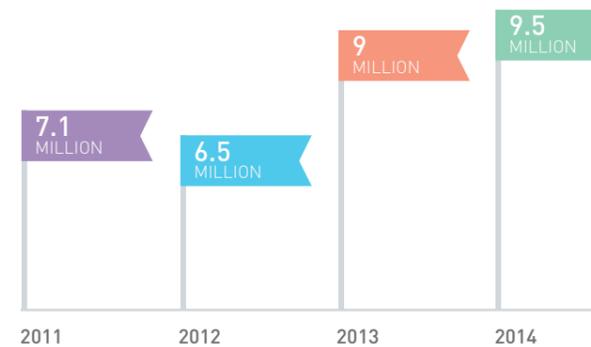
TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN THE UK (£BNS)



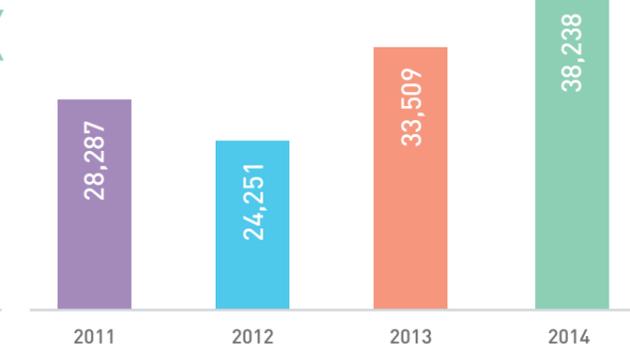
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS (£BNS)



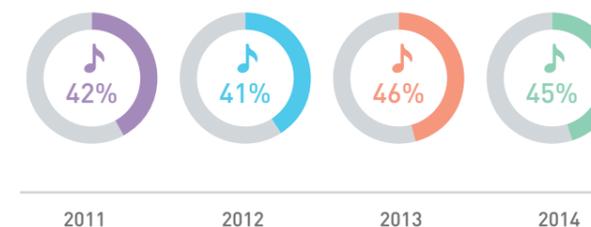
NUMBER OF MUSIC TOURISTS (MILLIONS)



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS WHILST IN THE UK



MUSIC TOURISM IN NATIONS & REGIONS





EAST OF ENGLAND



TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN THE EAST OF ENGLAND

Total
£326 MILLION

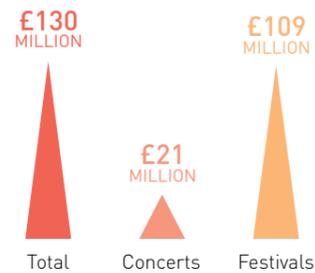
Concerts
£53 MILLION

Festivals
£273 MILLION

NUMBER OF MUSIC TOURISTS IN THE EAST OF ENGLAND



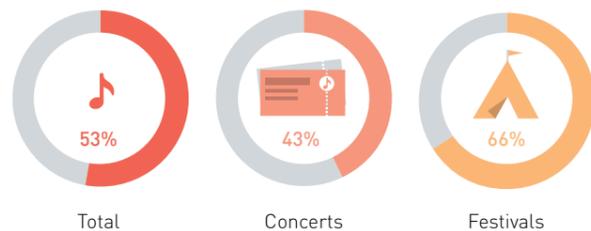
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS IN THE EAST OF ENGLAND



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN THE EAST OF ENGLAND



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS IN THE EAST OF ENGLAND



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN THE EAST OF ENGLAND



Photo Credit: | David Ackerley

CASE STUDY CAMBRIDGE FOLK FESTIVAL

Cambridge Folk Festival celebrated its 50th year in 2014, with a set from the legendary Van Morrison. It is well respected for bringing together some of the most highly-regarded folk musicians alongside contemporary country, blues, trad and bluegrass music from around the world.

2014 also featured sets from Sinead O'Connor, Ladysmith Black Mambazo and Eddi Reader, amongst others. Over the years, the festival has featured on BBC Four and Sky Arts. The first festival in 1964 sold 1400 tickets, almost broke even and featured a young Paul Simon. It now attracts around 10,000 people annually, many of whom return each year. Over the weekend of the festival, these visitors are served by a staff of over 200. In recognition of the sustainable way in which all of this is done, the festival has been named as "Outstanding" in the A Greener Festival Awards.



EAST MIDLANDS



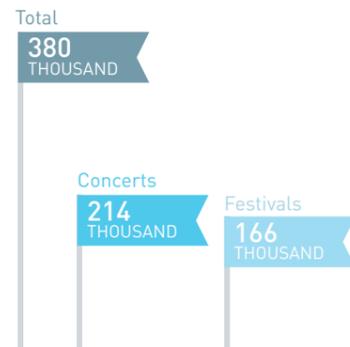
TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN THE EAST MIDLANDS

Total
£191 MILLION

Concerts
£46 MILLION

Festivals
£146 MILLION

NUMBER OF MUSIC TOURISTS IN THE EAST MIDLANDS



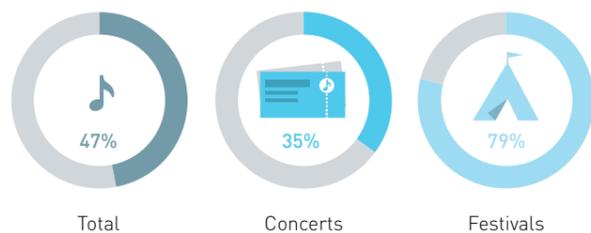
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS IN THE EAST MIDLANDS



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN THE EAST MIDLANDS



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS IN THE EAST MIDLANDS



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN THE EAST MIDLANDS



Photo Credit | DHP Family

CASE STUDY ROCK CITY, NOTTINGHAM

Rock City, Nottingham is an iconic venue that attracts international visitors and students to the city's universities in preference to those elsewhere in the UK. Over a 35 year history, it has played host to celebrated gigs by such massive names as Nirvana, Oasis and Public Enemy. In the past year, there have been around 110,000 attendees at gigs in the venue. This has included shows by Bastille, Haim and London Grammar.

Matthew Horne, who grew up in Nottingham and shot to fame on Gavin & Stacey, has said, "I've seen David Bowie, Radiohead and the Chemical Brothers at Rock City and I still go now". While Horne returns to Nottingham to visit Rock City, it has been drawing first time visitors to the city ever since the venue burst onto the live music scene amid the early 1980s punk and post punk scenes.



LONDON



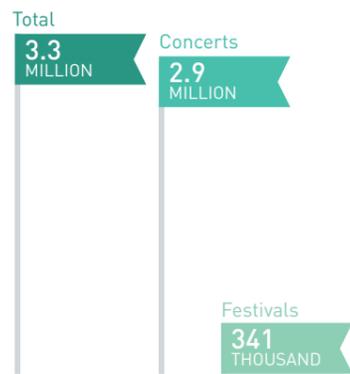
TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN LONDON

Total
£663 MILLION

Concerts
£479 MILLION

Festivals
£184 MILLION

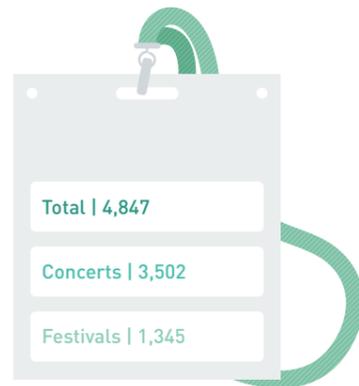
NUMBER OF MUSIC TOURISTS IN LONDON



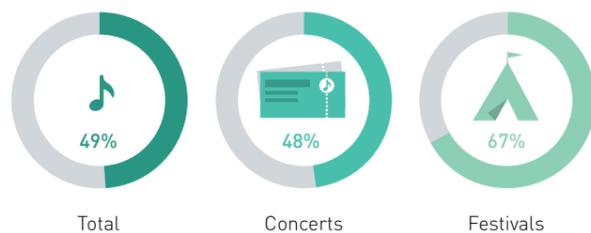
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS IN LONDON



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN LONDON



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS IN LONDON



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN LONDON

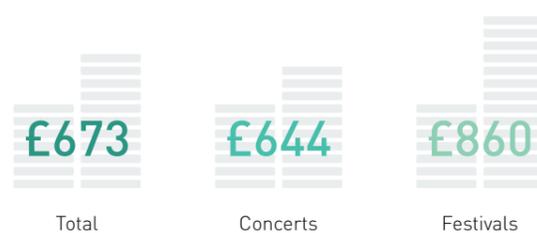


Photo Credit | KOKO London / Andy Sampson

CASE STUDY KOKO

KOKO is an historic London venue, drawing in 400,000 visitors to gigs and club nights each year. From Charlie Chaplin in 1910 to the Rolling Stones in the 1960s and the Sex Pistols in the 1970s, this has long been a venue central to London's globally significant cultural offering. It took six months of intensive restoration in 2005 to transform the venue into KOKO, which has since welcomed a series of massive stars: Madonna, Prince, Katy Perry, Kayne West, Red Hot Chilli Peppers, the Killers, Bruno Mars and many more.

KOKO draws in music tourists from across the UK and internationally. In many cases, these visits follow engagement with KOKO online. Over 300 million music lovers worldwide have watched gigs at KOKO online, while KOKO has 100,000 Facebook fans, 20,000 Twitter followers, and 10,000 KOKO app users. This online engagement helps to keep KOKO fresh and a central feature of Camden, an area integral to London's music scene.



NORTH EAST



TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN THE NORTH EAST

Total
£78 MILLION

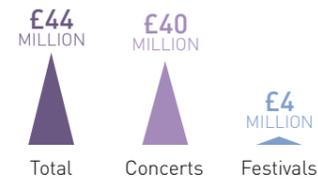
Concerts
£70 MILLION

Festivals
£8 MILLION

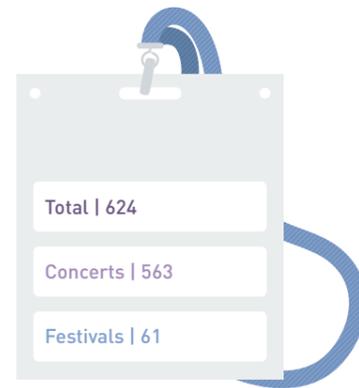
NUMBER OF MUSIC TOURISTS IN THE NORTH EAST



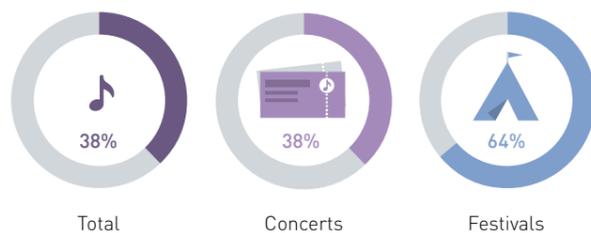
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS IN THE NORTH EAST



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN THE NORTH EAST



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS IN THE NORTH EAST



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN THE NORTH EAST



Photo Credit | Dan Brady

CASE STUDY SAGE GATESHEAD

Sage Gateshead enables people to both view and participate in music. They provide performances for all tastes - popular, jazz, world, classical, dance, brass bands, experimental, folk and more. Concerts take place throughout the day - mornings, lunchtimes, evenings - and tickets are available from £7 for most performances. Blondie, James Brown and Nick Cave are among those to have played the venue.

Since opening in 2004, Sage Gateshead has provided music making sessions to over a million people in more than 1000 places across North East England, reaching another million learners throughout the UK via three national music education partnerships. The venue is part of the Gateshead Quays development, which also includes the Baltic Centre for Contemporary Art and the Gateshead Millennium Bridge.



NORTH WEST



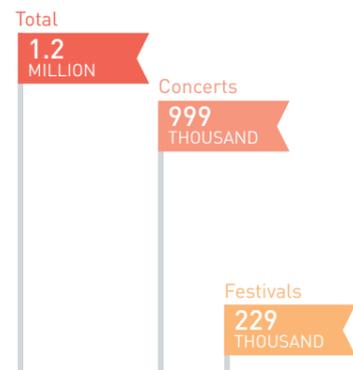
TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN THE NORTH WEST

Total
£383 MILLION

Concerts
£206 MILLION

Festivals
£177 MILLION

NUMBER OF MUSIC TOURISTS IN THE NORTH WEST



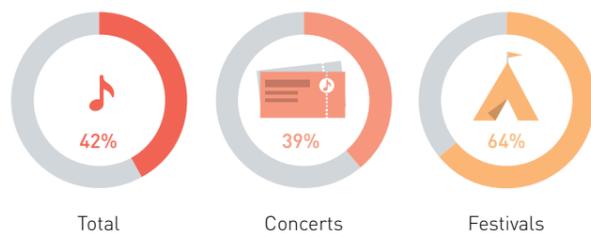
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS IN THE NORTH WEST



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN THE NORTH WEST



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS IN THE NORTH WEST



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN THE NORTH WEST



Photo Credit | Mark McNulty

CASE STUDY LIVERPOOL INTERNATIONAL MUSIC FESTIVAL

The Liverpool International Music Festival (LIMF) is held annually and is a key part of the musical landscape of the North West. 2014's line up included headliners Boy George, Foxes and the Royal Liverpool Philharmonic Orchestra, as well as a diverse range of local talent, performing over four days on the streets of Liverpool. The heart of the festival is LIMF Summer Jam, which is an entirely free, outdoor festival of live music and entertainment.

With a day of classic British cover bands, and a day of world music, 2014's line up had something for everyone, as Yaw Owusu, LIMF curator stated, "Liverpool is no ordinary musical city and I believe that Liverpool International Music Festival is no ordinary music festival". Clearly the audiences agree, as the 100,000 visitors to LIMF in 2014 helped bring £5.7m into the local economy.



NORTHERN IRELAND



TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN NORTHERN IRELAND

Total
£84 MILLION

Concerts
£41 MILLION

Festivals
£43 MILLION

NUMBER OF MUSIC TOURISTS IN NORTHERN IRELAND



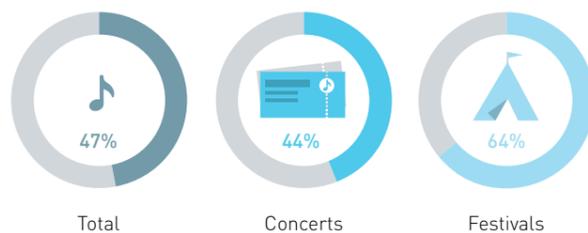
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS IN NORTHERN IRELAND



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN NORTHERN IRELAND



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS IN NORTHERN IRELAND



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN NORTHERN IRELAND



Photo Credit | Simon Graham

CASE STUDY ODYSSEY ARENA BELFAST

Odyssey Arena is Northern Ireland's premier, multi-purpose entertainment venue. It has hosted a wide array of events since opening in 2000. Not only providing a multitude of sports, including being the home to the Belfast Giants ice hockey team, the Arena can attract international stars from the worlds of pop, rock, hip-hop and classical music and stages unforgettable concerts. Its full capacity of 10,800 has attracted a wide range of stars, including Beyoncé, Rhianna, Lady Gaga, Michael Bublé, Rod Stewart, Black Sabbath and Andrea Bocelli.

The venue also hosted the MTV Europe Music Awards in 2011 and 3 weeks and 24 performances of MAMMA MIA! in 2008. It has further improved its customer offering through a £1.75 million re-fit of public catering and corporate hospitality areas.



SCOTLAND



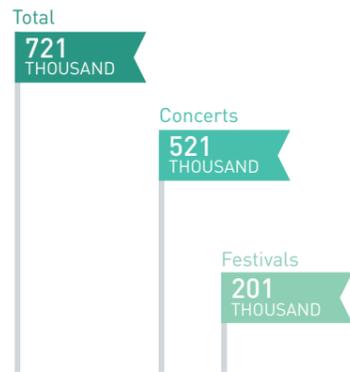
TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN SCOTLAND

Total
£280 MILLION

Concerts
£124 MILLION

Festivals
£155 MILLION

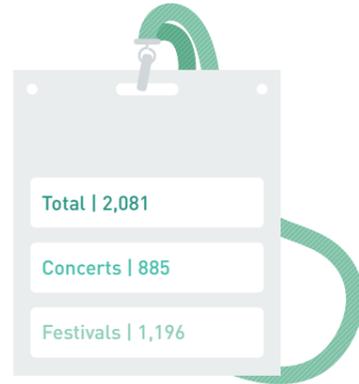
NUMBER OF MUSIC TOURISTS IN SCOTLAND



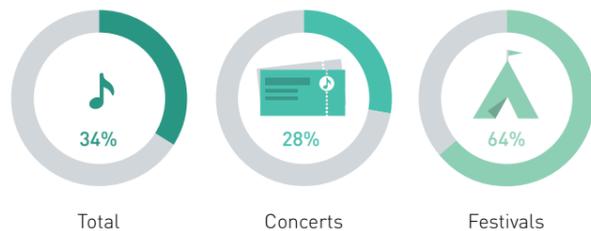
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS IN SCOTLAND



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN SCOTLAND



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS IN SCOTLAND



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN SCOTLAND



Photo Credit | Ross Gilmore

CASE STUDY T IN THE PARK

T in the Park is a rite of passage for the youth of Scotland and a popular event for all ages, both from all parts of Scotland and beyond. It began with 18,000 attendees in 1994 and has grown to now have 85,000 attendees on each day of the weekend. The camp site has a capacity of 70,000.

Previous research in 2012 by EKOS for T in the Park found that the festival is worth £40m annually to the Scottish economy. With a staff of 5000 working on the site over the weekend, the festival makes an important contribution to the wider relationship between music and tourism in Scotland. In the early days of Oasis, they played a tent at T in the Park, as D-Ream played the main stage. Things only got better for the festival, though, as Beyoncé, the Killers and Rage Against The Machine later played it.



SOUTH EAST



TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN THE SOUTH EAST

Total
£244 MILLION

Concerts
£64 MILLION

Festivals
£181 MILLION

NUMBER OF MUSIC TOURISTS IN THE SOUTH EAST



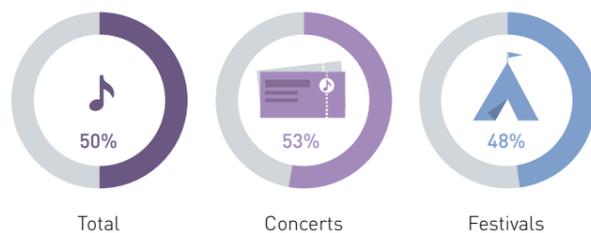
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS IN THE SOUTH EAST



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN THE SOUTH EAST



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS IN THE SOUTH EAST



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN THE SOUTH EAST

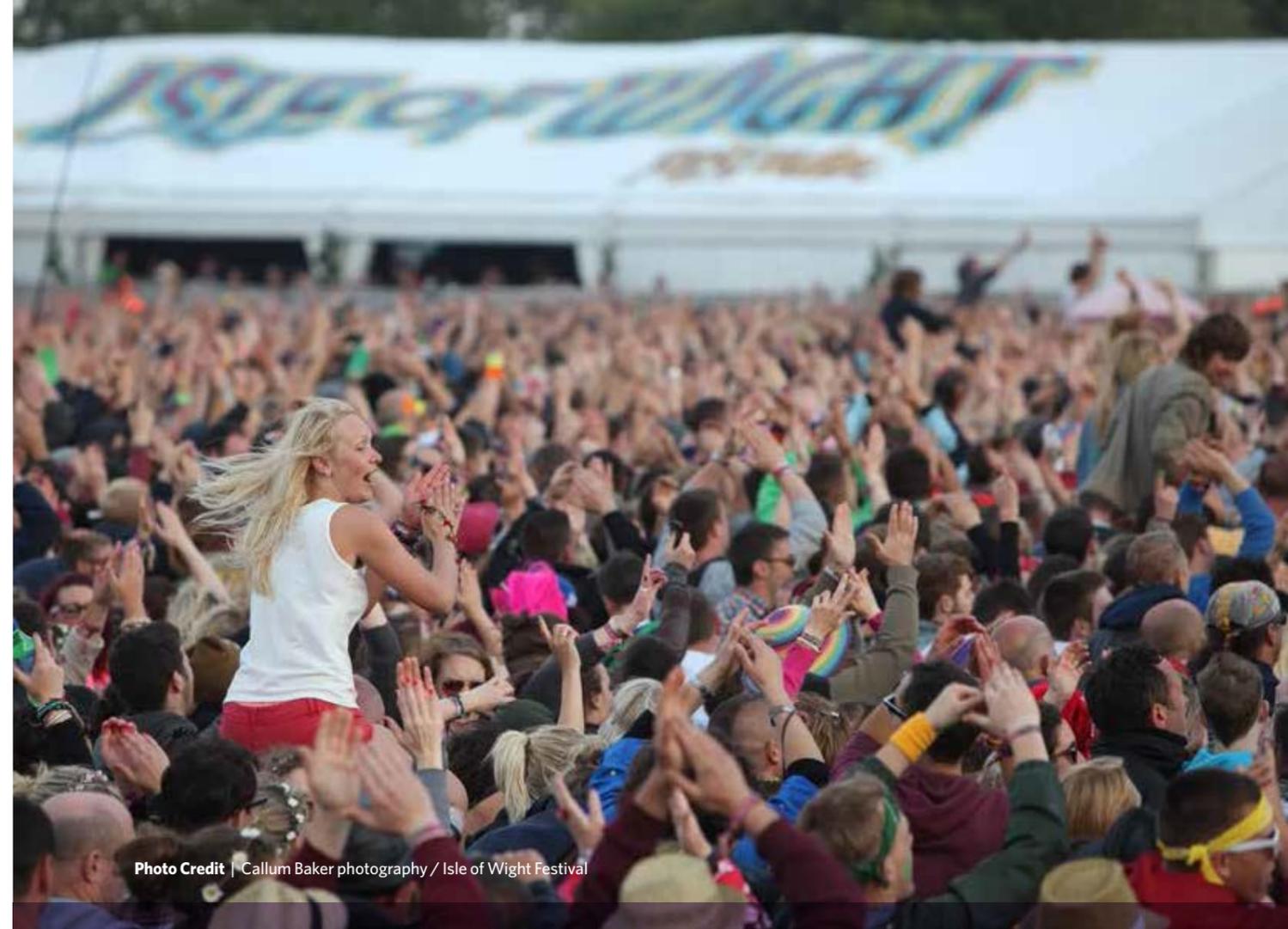


Photo Credit | Callum Baker photography / Isle of Wight Festival

CASE STUDY ISLE OF WIGHT FESTIVAL

The original Isle of Wight festivals held between 1968 and 1970 were something of a British equivalent of Woodstock, featuring artists like Bob Dylan, Jimi Hendrix, Joni Mitchell and The Who. The 1970 event was at the time one of the largest human gatherings in the world, with an estimated 600,000 people in attendance - leading to an Act of Parliament in 1971 preventing more than 5,000 from gathering in one place without a license.

The festival was not held again until 2002, when music promoter John Giddings made the move to re-establish the historic event. Since then, acts like David Bowie, Kings of Leon and Biffy Clyro have graced its stages.

Tourism is the largest industry on the Isle of Wight, and since 2002 the festival has brought an average of 50,000 attendees to the island each year. The location offers an incomparable experience with any other mainland UK festival: the geographical isolation provides an opportunity to make an event of the trip, and the island itself has its own micro climate.



SOUTH WEST



TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN THE SOUTH WEST

Total
£297 MILLION

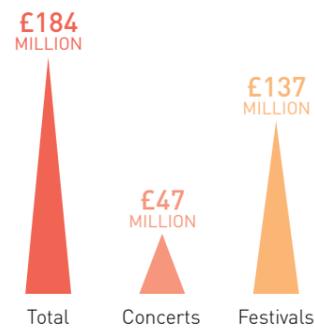
Concerts
£76 MILLION

Festivals
£221 MILLION

NUMBER OF MUSIC TOURISTS IN THE SOUTH WEST



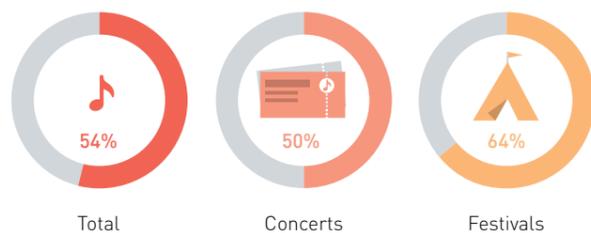
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS IN THE SOUTH WEST



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN THE SOUTH WEST



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS IN THE SOUTH WEST



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN THE SOUTH WEST



Photo Credit | Andrew Allcock

CASE STUDY GLASTONBURY

The Glastonbury Festival is arguably the world's most famous music festival and attracts visitors from across the globe. It has been held since 1970. That year 1500 attended, whilst well over 100,000 tickets have been sold in each year that it has been held over the past decade. Since its inauguration, it has played host to some of the biggest names in music with T-Rex, David Bowie and Peter Gabriel amongst early headliners. Glastonbury continues to evolve and innovate, with 2008 featuring the first ever hip-hop artist headlining the Pyramid stage, Jay-Z; a pattern that has continued with Kanye West a 2015 headliner, attracting a new generation of festival-goers.

The UK's largest music festival has a considerable economic impact in the local area. A 2007 EIA showed that Glastonbury impacted the economy to the tune of over £73million, and helps generate over 1000 jobs in the South West. Glastonbury now donates over £1m a year to charities and is a long standing supporter of Greenpeace and Water Aid.



WALES



TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN WALES

Total
£95 MILLION

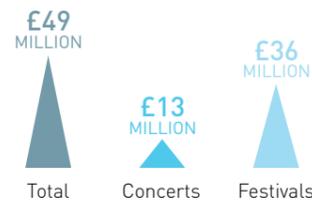
Concerts
£26 MILLION

Festivals
£69 MILLION

NUMBER OF MUSIC TOURISTS IN WALES



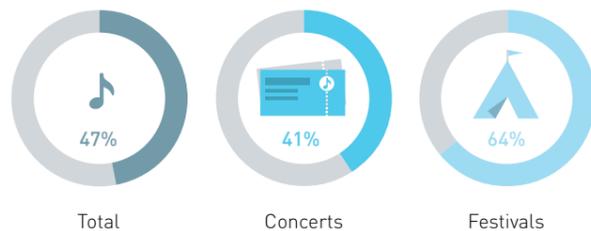
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS IN WALES



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN WALES



PROPORTION OF LIVE MUSIC AUDIENCE THAT ARE MUSIC TOURISTS IN WALES



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN WALES



Photo Credit | Dom Moore

CASE STUDY GREEN MAN FESTIVAL

Green Man is the largest music festival in Wales. It is held annually in the Brecon Beacons and is a fantastic example of a wealth creating festival. While retaining its position and the commercial pressures of a successful international independent music and arts event, it has managed to strategically develop tourism, showcase culture and create business and development opportunities in Wales. Projects such as the 'Settlement Pass,' attracts over 2000 visitors per day for a four day period, allowing visitors to extend their festival ticket into a 7 day Welsh holiday. Strong support and promotion of Welsh leisure and tourist businesses through the festival means that they can maximise the opportunities. The ticket price is subsidised by Green Man to create a value for money experience, which is also attractive to attendees.

Positive messages regarding Wales and its visitor attractions are presented within the overall marketing of Green Man, resulting in nearly 5 per cent of its 20,000 visitors coming from outside the UK, while half attend an additional event or place of interest in Wales as part of their visit. Green Man has a deep commitment to Wales and its people and has set up a charity to support training, arts, culture, community, environment and health schemes. Due to its success as a wealth creator and international marketing opportunities generated by its brand Green Man has become an essential part of the economy. The National, Alt J, War on Drugs, Van Morrison, Mumford and Son, Waterboys, Patti Smith, Mogwai, Super Furry Animals and Jarvis Cocker are among the many respected acts to have played the festival.



WEST MIDLANDS



TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN THE WEST MIDLANDS

Total
£264 MILLION

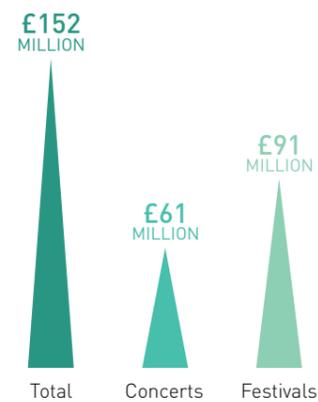
Concerts
£106 MILLION

Festivals
£158 MILLION

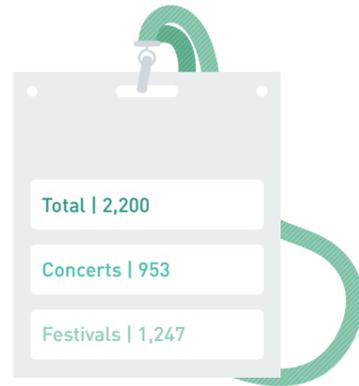
NUMBER OF MUSIC TOURISTS IN THE WEST MIDLANDS



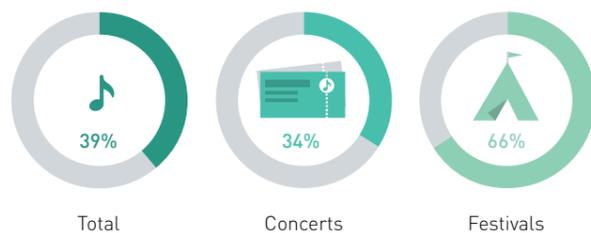
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS THE WEST MIDLANDS



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN THE WEST MIDLANDS



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS IN THE WEST MIDLANDS



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN THE WEST MIDLANDS



Photo Credit | Jason Sheldon

CASE STUDY GENTING ARENA, BIRMINGHAM

The Genting Arena is one of the world's top entertainment arenas - with over 100 shows per year, and welcoming over 900,000 people through its doors (2013/2014 figures). Ranked 13th in the list of 'Top 100 Arenas Worldwide' for music attendance by Pollstar, the venue supports 2500 jobs. It has a wide international draw with customers coming from all over the world.

has 27,540 plants. As of 2012, the site is zero landfill waste, as a result of an onsite waste pre-treatment centre - which opened after a £330,000 investment - that segregates all cardboard, paper, glass, wood, metal, carpet and plastic. The venue has picked up a two star Industry Green (IG) certification by Julie's Bicycle, while also installing an increased number of accessible toilets, lower level counters and wider corridors to improve disabled access. The Arena also opens up the Forum Live area in advance of headline shows to provide a space for unsigned, local talent to showcase themselves.

The Arena is socially responsible in its green credentials, disabled access and support for the local creative community. It boasts a 'living wall' feature that



YORKSHIRE & THE HUMBER



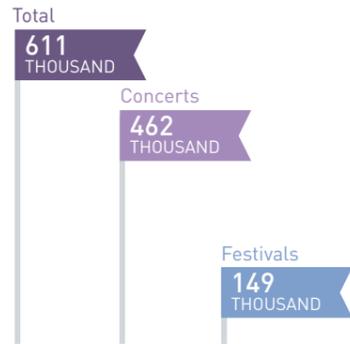
TOTAL DIRECT AND INDIRECT SPEND GENERATED BY MUSIC TOURISM IN YORKSHIRE & THE HUMBER

Total
£203 MILLION

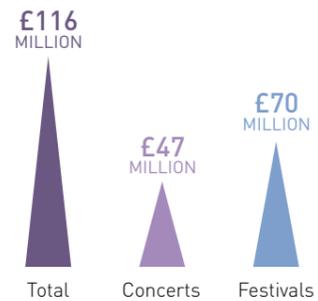
Concerts
£82 MILLION

Festivals
£121 MILLION

NUMBER OF MUSIC TOURISTS IN YORKSHIRE & THE HUMBER



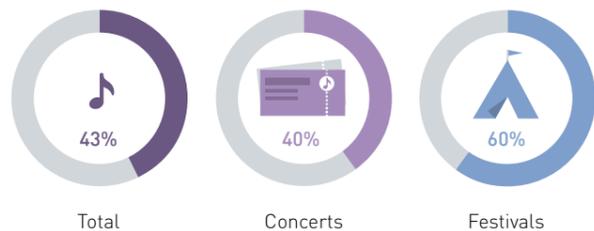
AMOUNT SPENT DIRECTLY BY MUSIC TOURISTS IN YORKSHIRE & THE HUMBER



NUMBER OF FULL TIME JOBS SUSTAINED BY MUSIC TOURISM IN YORKSHIRE & THE HUMBER



PROPORTION OF LIVE MUSIC AUDIENCES THAT ARE MUSIC TOURISTS IN YORKSHIRE & THE HUMBER



AVERAGE SPEND BY OVERSEAS MUSIC TOURISTS IN YORKSHIRE & THE HUMBER

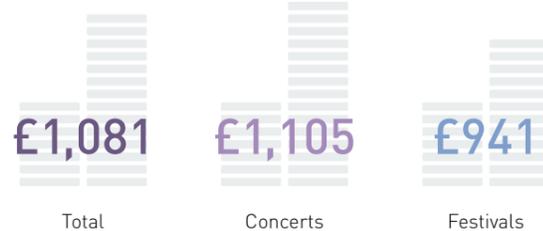


Photo Credit | Kevin Wells

CASE STUDY THE LEADMILL, SHEFFIELD

The Leadmill is the longest-running live music venue in Sheffield, opening its doors 35 years ago as an arts centre and music venue. Since then it has helped launch the careers of local bands from the Human League to the Arctic Monkeys and Pulp, as well as playing host to global superstars Coldplay, Muse and Kings of Leon.

Although famous for launching the careers of up-and-coming bands, in 1983 one slipped through the net: as Rupert Dell, the Leadmill's current manager described, "Legend has it Madonna was to have played at the Leadmill but they didn't book her because she wanted too much money".

The Leadmill was recently awarded a Music Heritage Award by PRS for Music, which was unveiled by Pulp at an event broadcast live from the venue on BBC 6 Music's Steve Lamacq show. Pulp first played at the Leadmill on 16 August 1980. Other recipients of the Music Heritage award include Elton John, Blur, Soul II Soul, Faithless, UB40, Spandau Ballet and Queen.

The Leadmill's offer has diversified in the 2010s and now as well as live music the 900-capacity venue also holds regular club and comedy shows, ensuring a relevant and diverse audience. 2015's gigs include Johnny Marr, formerly of the Smiths, Supergrass' Gaz Coombes and Australian singer Courtney Barnett.

MUSIC TOURISM INFRASTRUCTURE





Photo Credit | Ana Curbelo

JEFF SMITH · HEAD OF MUSIC, BBC RADIO 2 & 6MUSIC
"Tyneside has such rich and colourful musical history from Bryan Ferry to newcomer Nadine Shah, both of whom appeared at the second 6 Music Festival. The BBC was welcomed with open arms by thousands of listeners who have a passion for live music, and local venues who we partnered to put on one of the most diverse music festivals the region has ever seen."

CASE STUDY 6MUSIC FESTIVAL

Following the success of 2014 inaugural BBC Radio 6 Music Festival at The Victoria Warehouse in Manchester, in 2015 the BBC 6 Music Festival relocated to Tyneside (half in Newcastle, half across the other side of the Tyne in Gateshead). This featured over 40 live acts, interviews with the station's presenters, and a celebration of alternative music culture.

O2 Academy Newcastle and Sage, Gateshead were the venues for 6 Music Festival by Night, while there were many 6 Music Festival by Day events in venues in the Ouseburn and Stephenson Quarter areas. Hot Chip, Young Fathers and Public Service Broadcasting were among the acts to perform.



Photo Credit | Paul Carroll

CASE STUDY SHOWSEC

Showsec are crowd management and event security specialists that service a huge number of music events throughout the UK, making them responsible for the safety and security of millions of people at these gigs. The festival footprint stretches from T in the Park in Scotland all the way down to Bestival on the Isle of Wight with many of the major ones in between including Download, Wireless, Creamfields, Camp Bestival and V Festival. They also provide the front-of-house operation at a large number of venues, including SSE Arena, Wembley and Manchester Arena.

At Download Festival, Showsec's implementation of a Crime Reduction Strategy in liaison with Leicestershire Police resulted in a 70 per cent reduction in crime in 2014, while there were also significant reductions at many other events. Such successes are only possible due to the company's investment in tailored educational and training programmes that underpin the delivery of consistently professional and customer friendly security solutions. Showsec's HQ is in Leicester and has offices in London, Birmingham, Newcastle, Manchester, Liverpool, Sheffield, Cardiff, Bournemouth and Edinburgh

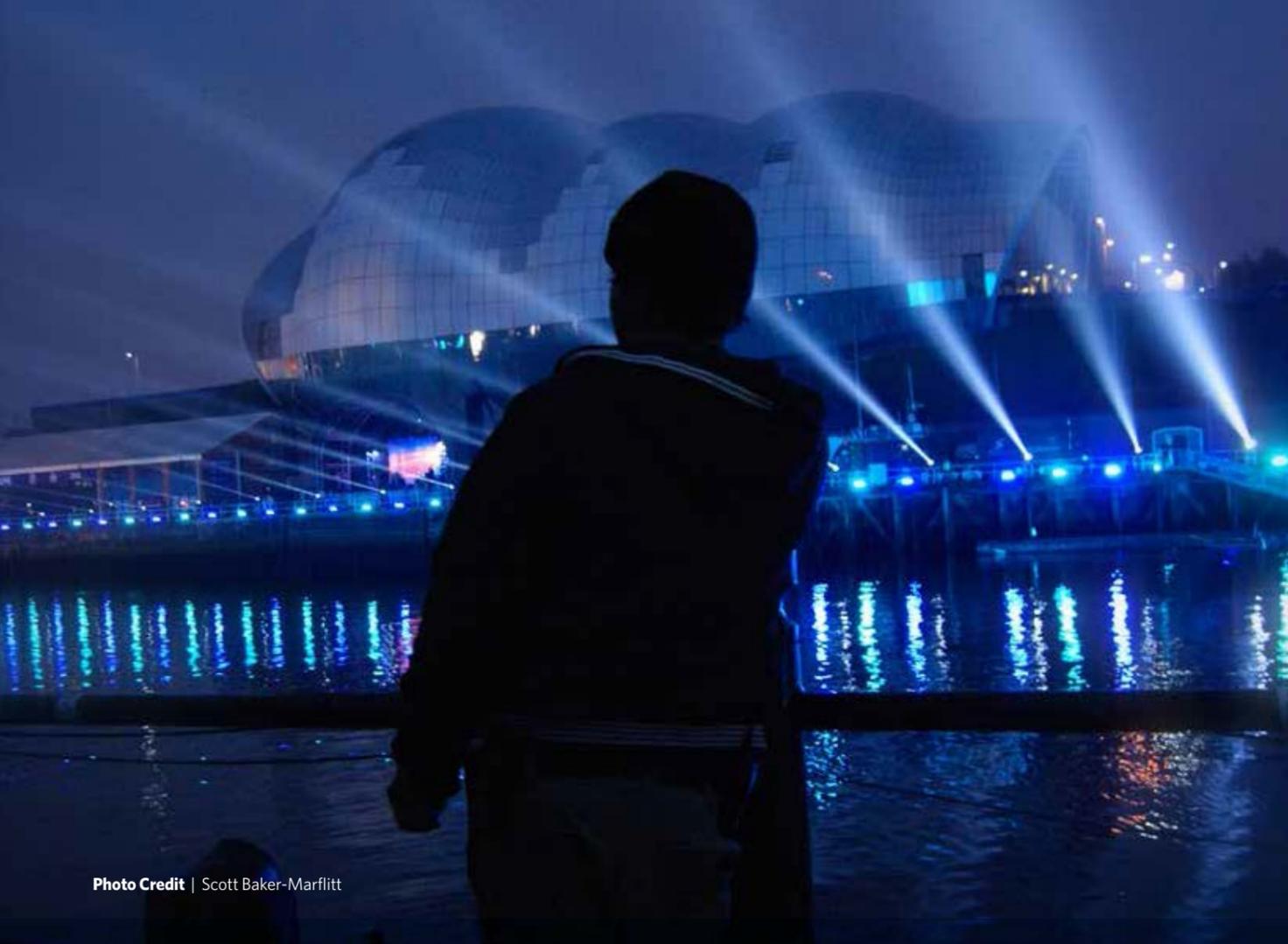


Photo Credit | Scott Baker-Marflitt

CASE STUDY NITELITES

Based in the North East of England, Nitelites are a 30 year old company and leading provider of lighting and audio production to the entertainment industry. They provide bespoke services for all kinds of live music events from small touring productions to full arena tours. The company has grown from humble beginnings in the back room of a German barber shop in North Shields, just above the Fish Quay, to a company who regularly tours the world with major artists, works on some of the most exciting festivals throughout the world but who have retained the ethos of diligent service that they've had throughout.

"I've been working with Nitelites," said Frank Turner, the folk/punk singer-songwriter, "for all my touring production needs for a few years now and they're brilliant, they give me everything I need and then some, they're part of the family now." Another artist that Nitelites has worked with throughout their career is Ben Howard. Over the past year, Nitelites have toured with Ben in America, Australia, continental Europe and New Zealand. The excellent performance of the company has recently been recognised with the company being nominated in the categories of Favourite Lighting Rental Company and Favourite Sound Rental Company in the 2014 & 2015 T.P.I. Awards (Total Production International).



Photo Credit | Amy Gilbert

CASE STUDY SITE EQUIP

Flat packed toilets were first imported from the US to the UK in 1989 to help give birth to the UK's first portable toilet company, Site Equip. Music festivals have been an important source of growth for the company and it has grown as music festivals have proliferated over the past decade or so. By 2005, Site Equip's capacity had extended to offering 1000 toilets for hire and in 2007 the company moved to a three acre site with a purpose built 5000 sq workshop and offices.

One festival that the company has worked with since the festival began in 2001 is Blissfields, a family-friendly music festival based in the Hampshire countryside, which has been listed in the Guardian as one of the 'Top 50 Boutique Music Festivals'. "The onsite staff are brilliant," Paul Bliss, organiser of Blissfields, has said, "nothing is too much trouble for them".

MUSIC IS

GREAT

BRITAIN

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