Manchester Music Economy Research

MANCHESTER CITY COUNCIL

February 2022

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Nordicity

Introduction

Music is the beating heart of Manchester. The city's music industry has played a formative role in social and cultural changes across the UK and where some of the biggest names in music have started out. Read any blog or article about where to visit for quality live music in the UK and Manchester will be on that list. It's this distinct reputation that can be galvanised to instigate further development where music is the central force that works to not only see growth within the immediate industry, but also supports growth in other industries.

While a strong reputation for live music and quality, diverse grassroots venues in Manchester is maintained across the world, the City Council, stakeholders of the music industry and decision makers work hard to evolve as a city of music through the Music Cities Network, the development of a Manchester Music City Steering Group, and continued support through cultural funding and investment pre-, during, and post- pandemic. It is a city recognised for its potential as a world-leading centre for sustainable and innovative entertainment, showcased in the upcoming venue, Co-op Live, which will be the UK's first purpose-driven, zero-waste arena.[1]

The city has developed a multi-faceted ecosystem that not only centres around live music, but also music education, varied genres, and emerging talent. It is via these channels that a need for a deeper exploration of the Manchester music economy was raised, to better understand the scale and make-up of the sector and, since COVID-19, to gain a baseline understanding for an efficient recovery process for the music industry and wider cultural offer.

About the project

In March 2021, Nordicity and Sound Diplomacy were commissioned by Manchester City Council to undertake a review of the city's economic landscape, looking at the needs and opportunities of the music sector in Manchester. With networks already in place to promote and grow the music industry, the research team was supported along the way through consultations with the Manchester Music City Steering Group, and input from the wider music ecosystem across Greater Manchester and nationally. It was through this collaborative process that a deeper understanding of Manchester's strategic, regulatory, cultural and economic framework was gained.

Manchester's music ecosystem is undoubtedly expansive, however with strategically placed support the industry has the clear potential to drive further economic, cultural and social

[1] Co-op (2021)

change in Manchester. This report will support Manchester City Council's prioritisation of the music industry for further development and aims to underpin the council's economic development strategy. It intends to hone in on the strengths of and opportunities for the city, looking more closely at the City of Manchester and providing a more focused spotlight following the wider sub-regional exploration of Greater Manchester that was completed by UK Music in 2019.[2] This Sound Diplomacy and Nordicity work is a starting point for Manchester to strengthen the relationship between the music ecosystem and decision makers city-wide, sub-regionally and nationally, building on what is already a thriving scene that is deserving of further growth and development.

Methodology

Mapping

Data was collated from existing mapping research, local and national sources ranging from industry associations, unions, guilds and funding bodies, and the Manchester Music City Steering Group ahead of an extensive web-scraping exercise. Physical music infrastructure was mapped to understand the breadth of Manchester's music ecosystem and, where relevant, comparisons made against other UK cities using Sound Diplomacy mapping data. Due to the COVID-19 pandemic, there may be discrepancies in the mapping as businesses may not reopen following government-led restrictions. The aim of the mapping is to provide a baseline understanding of what exists in the city; the figures do not represent all music-related work taking place in the city, but showcase the physical assets connected to music in the City of Manchester.

Stakeholder Engagement

A preliminary workshop was held with the Project Advisory Committee and an industry roundtable was held with the Manchester Music City Steering Group. These were used as an opportunity for information sharing, project updates and data and contact requests from the research team.

Survey

A survey for all music creatives, businesses, organisations and workers in Manchester was administered in summer 2021. A total of 121 completed responses were obtained, and approx. ~100 partially-completed responses were also obtained leading to a total of 221 usable survey

[2] UK Music (2019)

responses. The survey data was supplemented by Nordicity's further desk research and analysis, providing data for approximately an additional 400 Manchester music stakeholders, increasing the number of quantitatively analysed industry stakeholders to 635.

The survey captured qualitative, quantitative and economic impact information from industry stakeholders in Manchester covering the calendar years 2019 and 2020 to establish industry information from both before and during COVID-19. It focused on collecting quantitative primary data including company and individual financials, patterns of income and expenditure, as well as organisational profiles, industry SWOT perceptions, and monitoring data. The survey also contributed to the Mapping by identifying industry stakeholders not previously mapped.

Economic Impact Analysis

The economic impact analysis was undertaken by Nordicity through a two-part method, capturing the impacts from calendar years 2019 and 2020. First, a 'bottom-up' approach deploying with primary data collected by the industry. Second, a 'top-down' approach leveraging UK Music's Music by Numbers 2020 study[3] and a combination of primary and secondary research – including consultations with national and regional industry bodies and data from the Office for National Statistics (ONS). This 'top down' and 'bottom up' approach was deployed in order to derive estimates for the direct economic impact, and Nordicity's MyEIA Model™ was used to estimate the indirect and induced economic impacts and the portion of these retained by Greater Manchester's economy.

The economic impact of Greater Manchester's music sector is presented as the sum of the employment and GVA generated for six core music sub-sectors as defined by UK Music:[4]

1. Music creators
2. Live music and music tourism
3. Recorded music
4. Music publishing
5. Music representatives
6. Music retail

[3] UK Music (2020a)
[4] Ibid. Taxonomy established by UK Music in Music By Numbers.

Nordicity undertook economic consultations with the following 18 national and regional representative groups.

1. Association of Independent Festivals (AIF)
2. Association of Independent Music (AIM)
3. Association of Independent Promoters (AIP)
4. British Phonographic Industry (BPI)
5. Concert Promoters Association (CPA)
6. Entertainment Retailers Association (ERA)
7. Featured Artists Coalition (FAC)
8. Greater Manchester Combined Authority (GMCA)
9. LIVE (formerly UK Live Music Group)
10. Music Managers Forum (MMF)
11. Music Producers Guild (MPG)
12. Music Venue Trust (MVT)
13. Musicians' Union (MU)
14. National Arena Association (NAA)
15. PRS for Music
16. PRS for Music Foundation
17. The Entertainment Agents' Association (TEAA)
18. UK Music

Data from a study of grassroots music venues (GMVs) conducted by Nordicity (with the Music Venues Trust and Mayor of London) in 2016[5] was used to derive estimates of the impact of the music ecosystem on the night-time economy in Greater Manchester and Manchester.

Data from UK Music's This is Music 2021[6] was used to derive estimates of employment and GVA in Greater Manchester and Manchester in 2020 - and thereby the impact of the COVID-19 pandemic on the music ecosystem.

Policy Review

Guidance was provided by Manchester City Council, Marketing Manchester, Arts Council England, Greater Manchester Combined Authority, and CityCo in a workshop that informed Sound Diplomacy and Nordicity on key strategies and policies on Manchester and Greater Manchester's agendas, including *Our Manchester Strategy* and *Our Manchester Industrial*

[5] Nordicity, Music Venues Trust and Mayor of London (2016)
[6] UK Music (2021)

Strategy. The policy review used other policies and reports for contextual guidance, and identified areas where the music industry can support key objectives and where plans in Manchester can support growth in the music industry. The two documents were selected by the City of Manchester as the most significant current strategies for review, and provided Sound Diplomacy and Nordicity insight and context for the survey questions and economic impact.

About Nordicity

Nordicity is an international strategy consultancy and global leader in the economics of culture and the creative industries, heritage and the creative economy. For over 40 years, Nordicity has been at the forefront of economic analysis. Nordicity provides strategy, policy, economic and social impact analysis, and monitoring, evaluation and learning for the private sector, industry trade bodies and associations, and local, regional, national and intranational government bodies.

About Sound Diplomacy

Sound Diplomacy is the leader of the global music cities movement. As strategists for cities, developers, large private sector organisations and governments, Sound Diplomacy provides cutting edge research and market expertise in placing music and night time economy strategy in city, urban and development plans. Sound Diplomacy works in over 30 countries and counts the Mayor of London, City of San Francisco, Lendlease, Walton Family Foundation and City of Brisbane as clients. They also run the global leading series of conferences of music and public policy, called Music Cities Events.

Mapping Analysis

Introduction

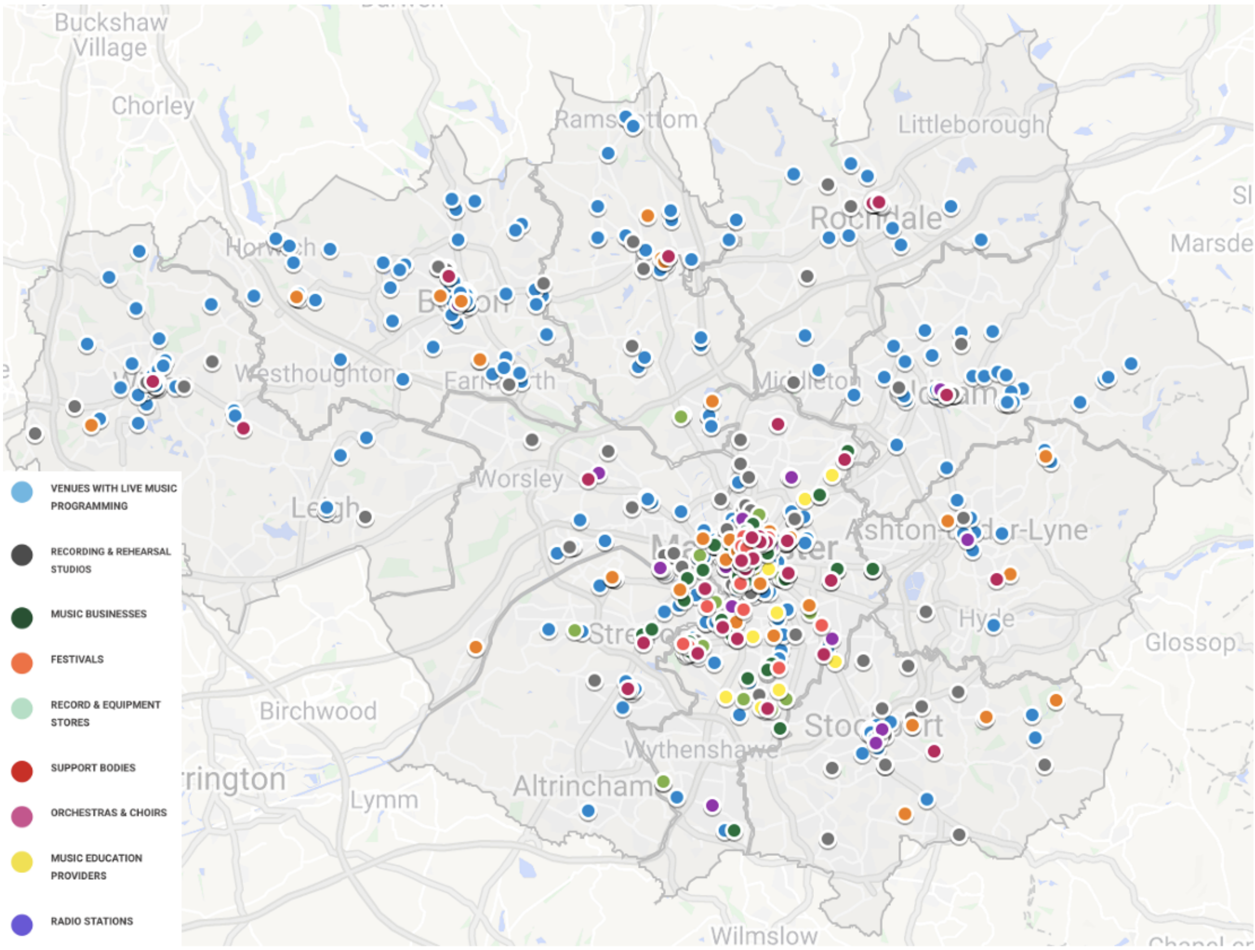
An in depth mapping exercise was undertaken from April to May 2021. Existing lists and data were gathered and reviewed by the Manchester Music City Steering Group, and lists from local and national sources such as Music Venue Trust, UK Music and Musicians' Union were incorporated. Following engagement and data gathering, an extensive web-scraping exercise was completed in order to identify any previously unmapped stakeholder groups and sub-sectors.

The focus of the following analysis is on the City of Manchester, highlighting the breadth and depth of its music ecosystem. It is a living map which we encourage music stakeholders to continue updating and adding to. The mapping showcases only physical spaces; organisations/businesses with a registered office/venue/shop. Therefore, the following figures do not represent the entire workforce of the City of Manchester, but allow us to gain a general understanding of the assets that exist and can be accessed by the music industry, other industries, visitors and residents.

The interactive map can be accessed at https://www.google.com/maps/d/edit?mid=1b2AhcSnjz38wj7MPPMB58KfZ9CWUOeVv&ll=53.567071136206856%2C-2.471445929786198&z=10

Analysis

Figure 1. Full Mapping Of 810 Music-Related Assets In Manchester And Greater Manchester



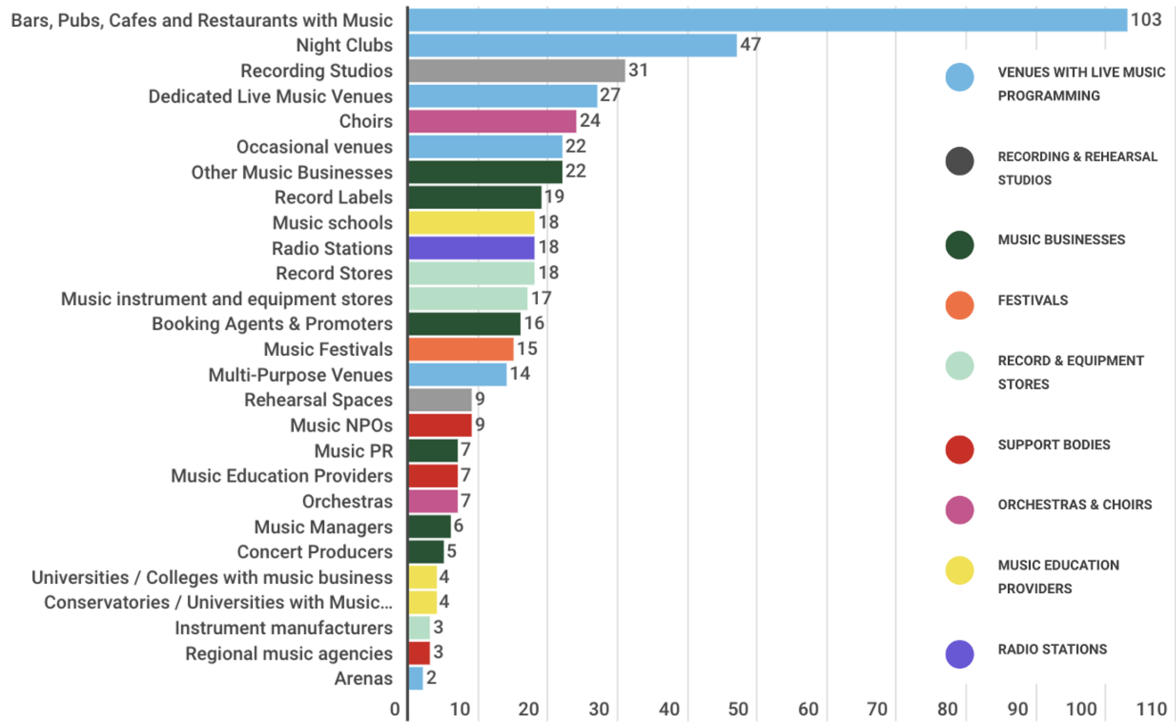
A total of **810** music assets were mapped across Manchester and Greater Manchester as of May 2021. All physical infrastructure connected to music was mapped in the City of Manchester (**477 total assets**) and infrastructure connected to the live music scene and performance (venues, festivals with music, music radio stations, recording studios, rehearsal spaces) were mapped in Greater Manchester (**333 assets**). The decision to partially map Greater Manchester allows us to compare the sub-region's biggest economic driver, the live music scene between the City of Manchester and boroughs within Greater Manchester.[7] We also mapped support bodies and not-for-profit organisations across the same area as these typically serve the whole sub-region, not just the immediate place in which they're located. To

[7] Whilst the project only required a City of Manchester mapping, a decision was made to map solely the live music aspect of the Greater Manchester sub-region as this is the biggest sub-sector of the local music industry

gain a deeper understanding across all sub-sectors, Manchester City Council could consider undertaking a full mapping of the entire sub-region of Greater Manchester.

NB: For a detailed breakdown of how each asset is categorised please see Appendix 1

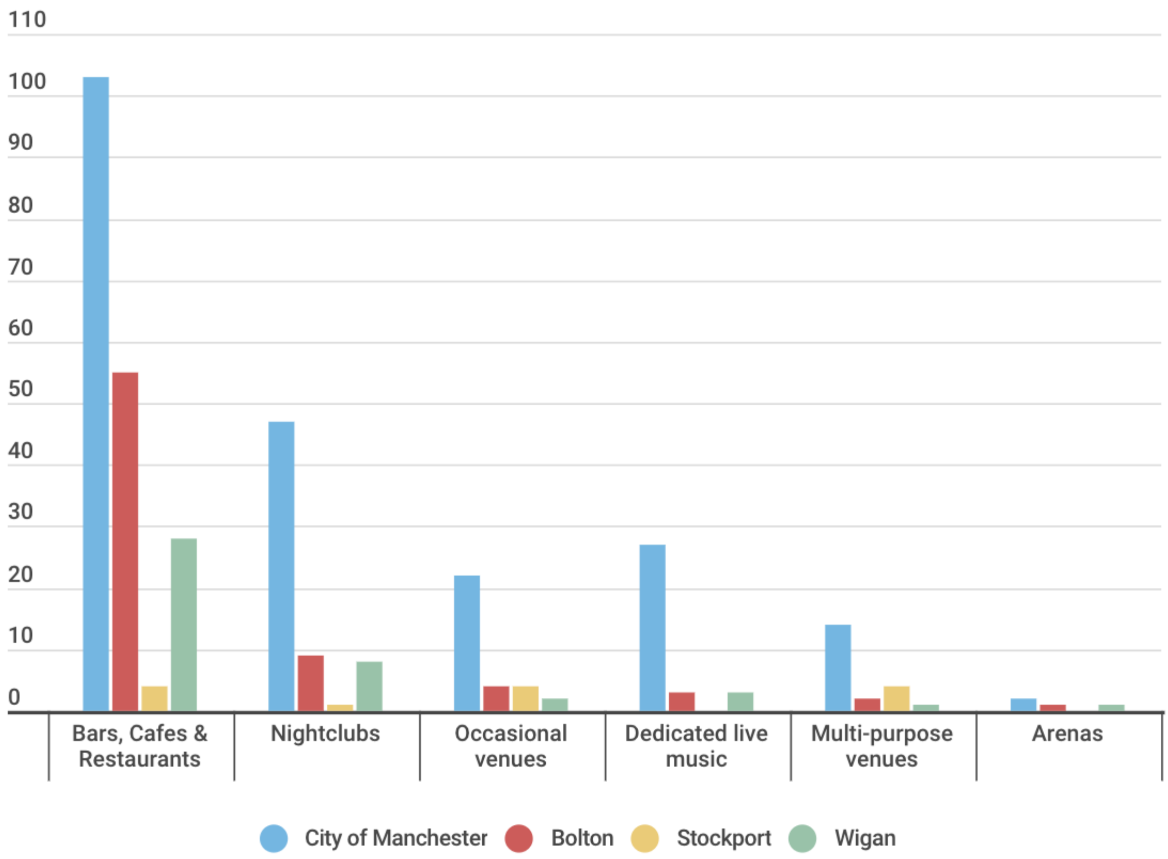
Figure 2. Total 477 Assets Across The City Of Manchester



Live Music

Live music assets make up the greatest proportion (45%) of the music ecosystem in the City of Manchester. 59% of all mapped venues with live music programming across the whole of the Greater Manchester sub-region (including the City of Manchester) are classified as bars, pubs, cafes and restaurants. The Greater Manchester sub-region has 469 music related venues with 215 concentrated in the City of Manchester where the diversity, capacity and range of venues is greater. The chart below compares the 4 most populous towns/cities of Greater Manchester by live music venues, showing the greatest concentration of nightclubs and dedicated music venues can be found in the City of Manchester. This would be expected as Manchester's night time economy caters to residents from across the subregion and high levels of visitors compared to the sub-regional towns.

Figure 3. City and Town Comparisons Of Music Venue Assets Across 4 Most Populous Towns/Cities of the Greater Manchester Sub-Region



In Greater Manchester (excluding the City of Manchester) venues with live music programming are concentrated in town and city centres; Bolton (71) and Wigan (43), creating live music scenes outside of the City of Manchester; decentralising the music offer of the sub-region and reducing the need for travel to Manchester City Centre to experience live music.

These figures also demonstrate that live music entertainment is more widely available in establishments connected to the night-time economy rather than in dedicated live music spaces, however the potential for high audience numbers is greater at music events at

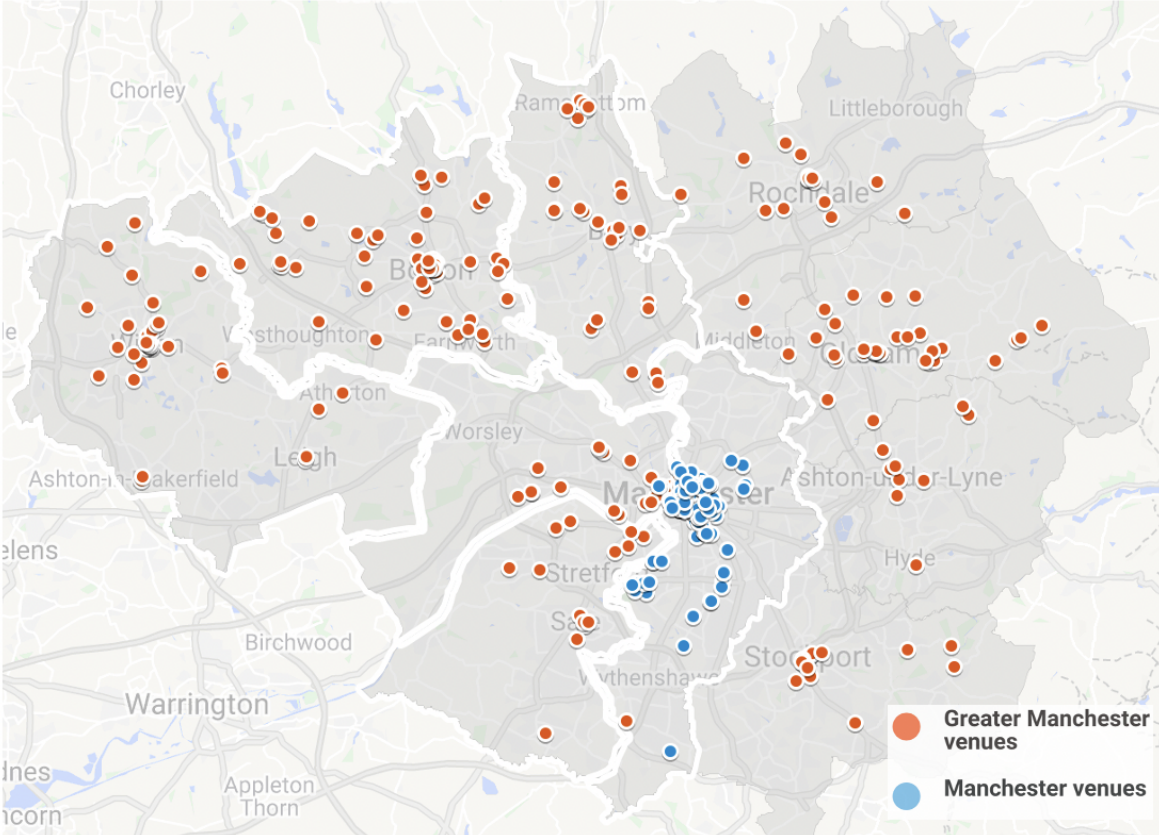
Manchester AO Arena as well as other live music venues with large capacity, such as Castlefield Bowl, Bridgewater Hall, Albert Hall and Manchester Academy. These venues also have the greatest opportunity for attracting music tourists through the programming of high profile acts, larger marketing budgets and greater audience capacities. Whilst there are smaller stadiums and arenas across the sub-region, Manchester AO Arena is the most economically and culturally significant for its music programming, not just for the region but nationally and internationally. 1.2 million visitors attend events there every year with music as one of the major selling points.

An increase in music tourism is also expected to be seen once new venues, Co-op Live Arena and The Factory open (with various capacities depending on configuration) in 2022-23, as well as increasing the opportunity for residents to experience live music in purpose built, quality venues, and for an aspirational career ladder for musicians and artists which will help with talent development and retention in Manchester. Increasing and broadening this venue infrastructure will only be suitable if diverse programmes and management are also committed to.

The below map shows the distribution of all mapped infrastructure connected to live music programming. At first glance, it displays clear clusters of assets, however, by delving into the individual venues that are represented by each pin, we are able to reveal rich live music scenes with a competitive variety of venues across the sub-region, from The Old Courts in Wigan to The Spinning Top in Stockport, Whittles in Oldham to The Albert Halls in Bolton. As in the City of Manchester, there is something for everyone in Greater Manchester, from intimate gigs to large-scale music events. Whilst the mapping can only depict physical infrastructure, we are able to take this data and reveal the existence and potential for audience engagement through live music venues in both the City of Manchester, and the rest of Greater Manchester. This is also supported by existing assessments of Greater Manchester's music audiences, which was found by UK Music to be 1.9 million in 2017, of which 1.2 million was made up of local audiences.[8]

[8] UK Music (2019) p. 8

Figure 4. Distribution of All Venues with Music Programming in Manchester (215 in blue) and Greater Manchester (254 in orange)



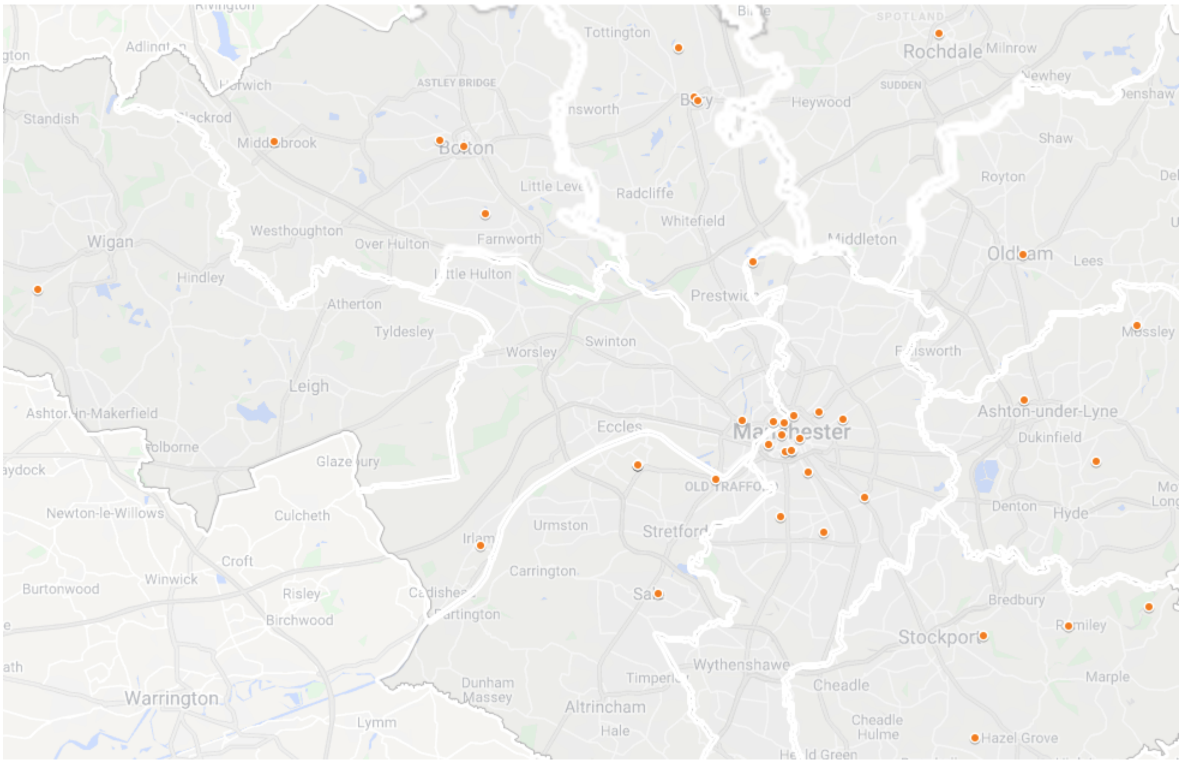
The live music offer in Manchester surpasses that of other major UK cities such as Cardiff and Belfast. Despite having strong music scenes, their offer is made up of 64 and 84 music venues respectively, a vast difference to Manchester's 215. As already mentioned in this report, Manchester's reputation for live music requires little promotion, but this figure is significant for the City Council to be aware of.

Another aspect of the live music scene includes music festivals. These are evenly distributed across Greater Manchester in towns such as Bolton, Bury, Stockport and Oldham (Boltfest, Rockstock, Glaston-BURY) while 37.5% of all mapped festivals are based in the City of Manchester. Manchester's music festivals attract vast crowds, from residents to visitors, to the city and showcase some of the best acts from Manchester while also programming performances from high profile national and international artists, musicians and orchestras: Bjork, Disclosure, Skepta, Megan Thee Stallion, pianist Hélène Grimaud and Moscow

Philharmonic, to name a few. The 2021 edition of Parklife saw around 80,000,[9] and the Manchester International Festival reached 2,662,244 people, of which 1,200,000 were online, [10] proving that if the events are available, people will attend, and online availability has vast scope for increasing audience numbers.[11]

The map below shows the distribution of festivals. The mapping exercise revealed a wide range of activities and opportunities for those living outside of the city to engage in music. Local festivals can also create opportunities for school engagement, performance showcasing for emerging artists, and tourist attraction.

Figure 5. All 40 Mapped Music Festivals Across the City of Manchester And Greater Manchester

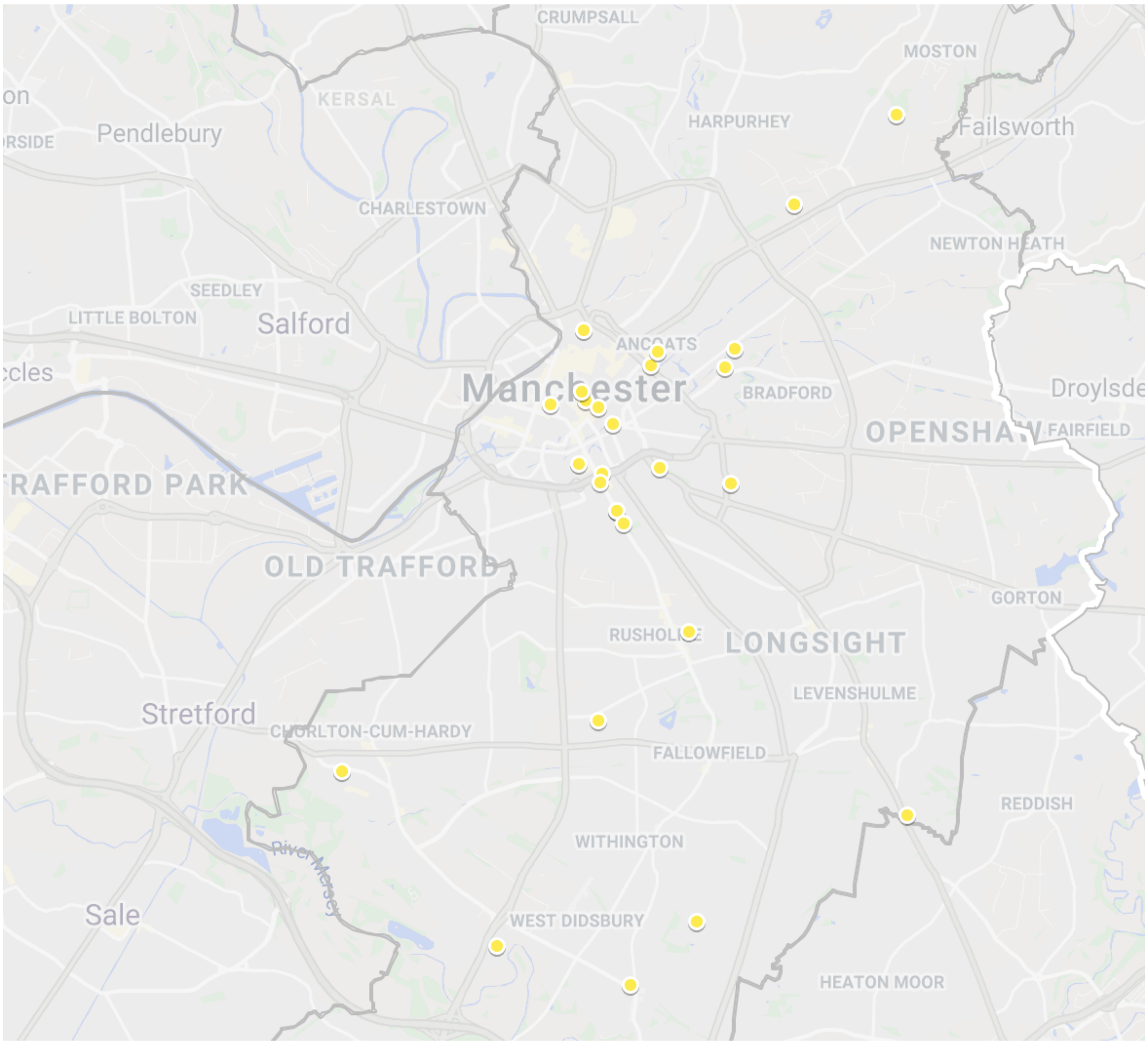


Talent pipeline

[9] Manchester Evening News (2021)
[10] Manchester City Council (2021b)
[11] There are also many music festivals and events which are held outside of Manchester, such as Blue Dot Festival in Cheshire, whilst their operations and year-round impact are situated in Manchester

As already mentioned, the decision was made to only map the City of Manchester for music education, which revealed an extensive array of music education options, providing important pathways to music careers. 28 music education assets were mapped in total, this figure doesn't include individual music teachers/freelancers, which if Manchester City Council was to explore, we would expect to see high numbers for a city of this size and standing.

Figure 6. All 28 Music Education Assets Mapped in the City of Manchester



MyHub is the Music Education Hub for the City of Manchester and responsible for music education opportunities on behalf of the Department for Education and Arts Council England. The learning offer for music performance and instrument is diverse via MyHub, from steel pan, Irish and Russian bands to pop, folk and jazz courses, including online camps for girls.[12] However, it's classical music where the city excels in music education and talent pipeline opportunities and where we can see a cross over of activity between the mapped music education assets and orchestras and choirs. The Hallé Orchestra organises the Hallé for Youth series on an annual basis, where schools are invited to a dedicated concert at The Bridgewater Hall - a 2300+ capacity concert hall - to experience live classical music in person. Alongside this, four primary schools across Greater Manchester are selected to devise music inspired by that year's concert programme. Student dancers from the Northern Ballet School choreograph a piece to go alongside the music and it is performed on stage in full costume with the primary age pupils for family and friends, as well as during the Hallé for Youth concert.[13]

Other world renowned orchestras, Manchester Camerata and the BBC Philharmonic also provide key learning experiences for young people, working with schools and teachers to help students learn about lyrics, composition and composers, as well as take part in youth orchestras. These opportunities have the potential to develop interest in music from a young age and retain talent in Manchester for careers. Improved social inclusion, health and wellbeing are other benefits that come from a music education. Musicians can progress from youth orchestras to conservatoires like Chetham's School of Music and the Royal Northern College of Music or complete degrees at the University of Manchester or Manchester Metropolitan University.

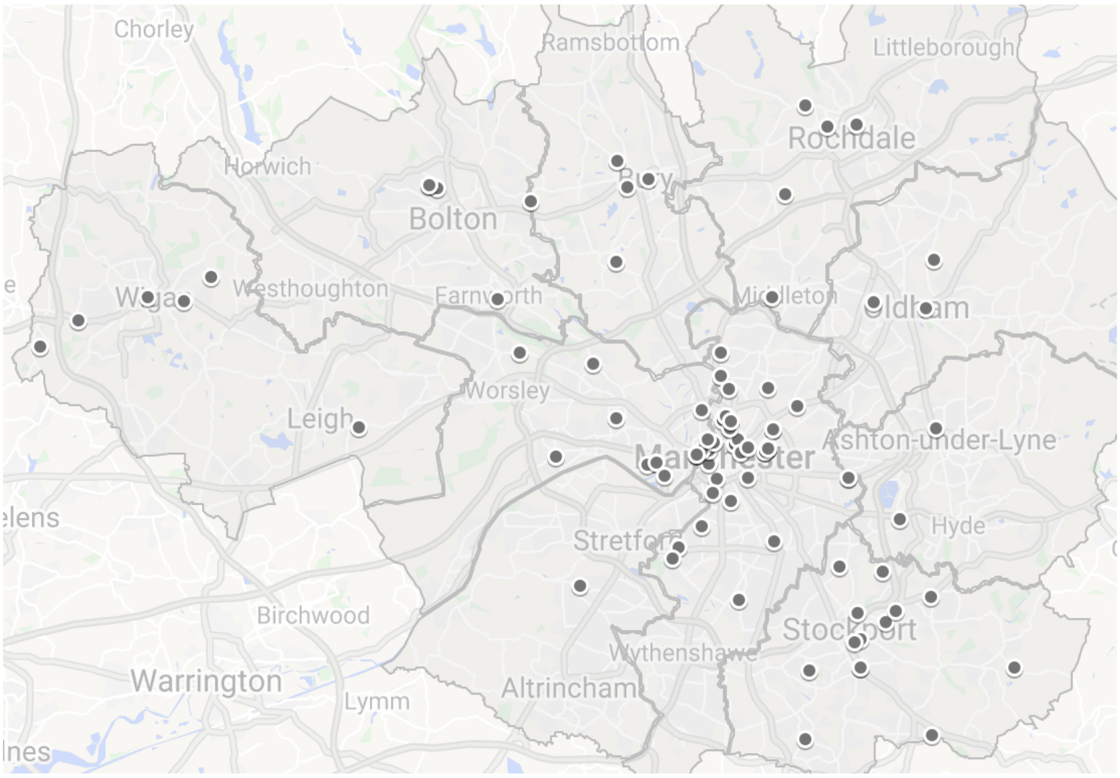
Whilst there are extensive opportunities for music performance learning and participation, there are areas where Manchester, as well as many other cities in the UK and globally, has room for improvement. In schools, business skills and music tech education is limited, therefore also limiting awareness of, and the potential for, talent development into non-performance music industry careers. This finding is supported by the Musicians' Union report into music education across England in 2019.[14] Children and young people gaining an understanding of the roles within the music industry and obtaining skills in music technology, management, production, promotion and publishing (as well as many more) can help to deliver the strategic objectives of the city (digital development, business attraction, residential growth) and increase employment opportunities.

That being said, for further education, Access Creative College and The Manchester College offer a wide range of opportunities for music learning. Furthermore, when looking at higher education, the Royal Northern College of Music and BIMM Institute Manchester offer a wide range of degrees and diplomas from performance in multiple genres to production, music

[12] MyHub (2021)
[13] Hallé Orchester (2021)
[14] Savage, J., and Barnard, D (2019)

business and marketing to event management.[15] Children and young people can also access informal skills development opportunities from charities, organisations and festivals in Manchester (many of whom partner with MyHub Music Education Hub) such as Brighter Sound, MACFEST, and Reform Radio.

Figure 7. All 31 Recording Studios in Manchester and Greater Manchester



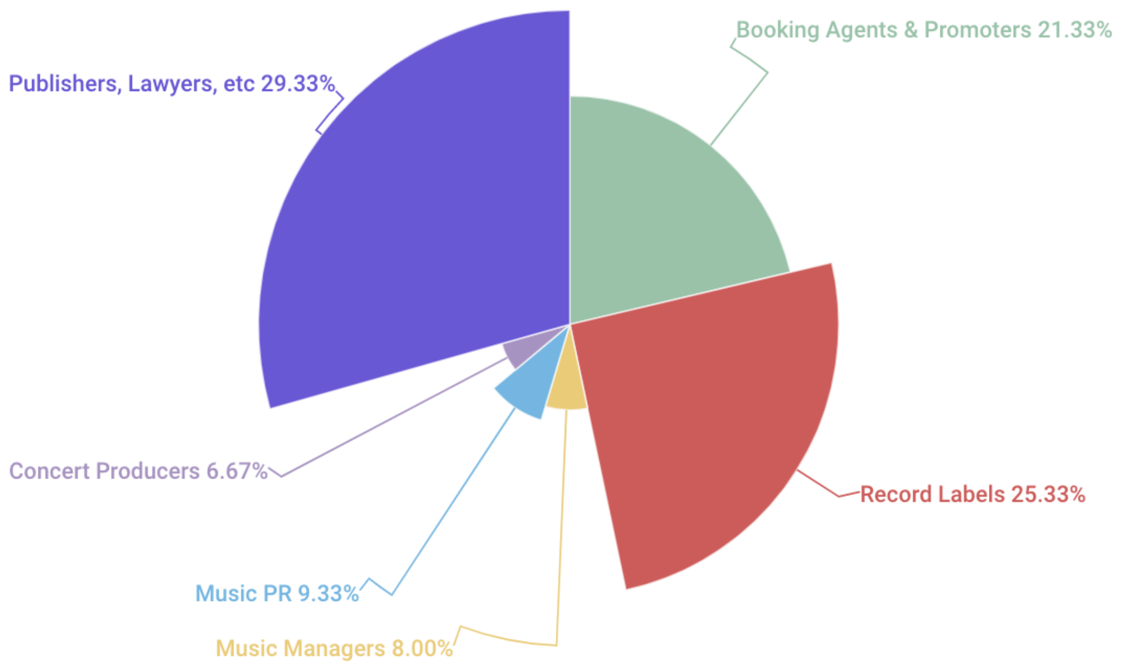
Recording studios and rehearsal spaces can also often play a significant role in talent development, work experience and increasing knowledge of the roles within the music ecosystem. The image above depicts all recording and rehearsal studios across the entire Greater Manchester sub-region. Partnerships with schools could play a critical role in Manchester's talent pipeline. In terms of opportunities for jobs within the recorded music industry and options for recording artists living in and visiting the City of Manchester, it is on par with its north-west competitor, Liverpool (that also has 45 mapped recording studios) but

[15] BIMM Manchester (2021)

Manchester is highly competitive compared to other cities, such as Belfast where there are 18 recording studios, and Cardiff 27.

Music Businesses

Figure 8. Breakdown of all 75 Music Businesses in the City of Manchester

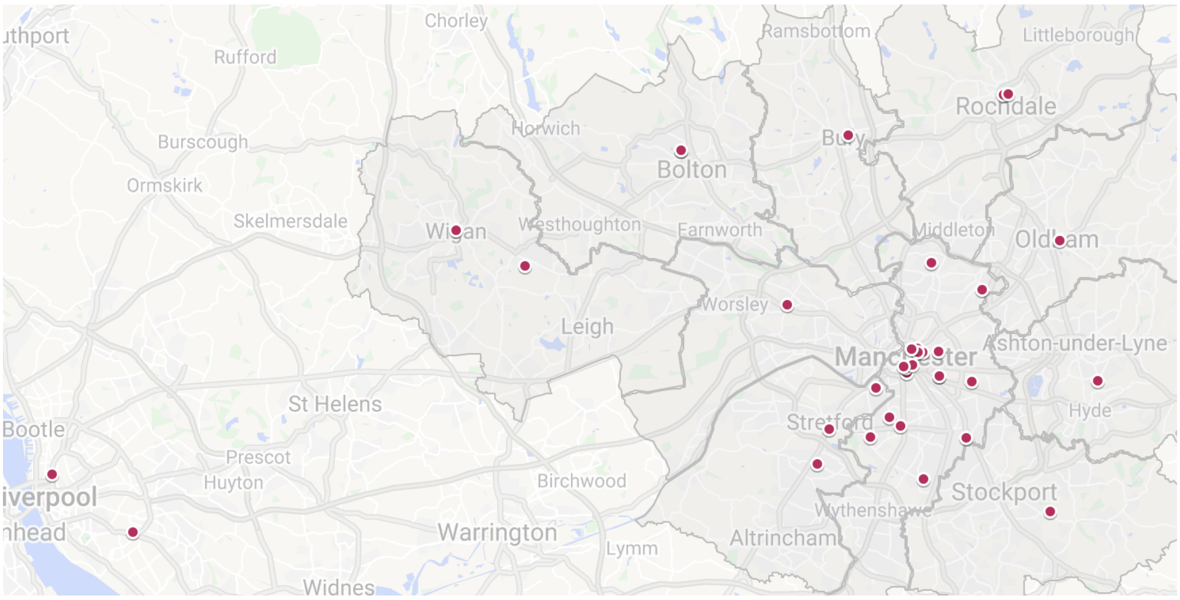


75 assets related to music business (record labels, booking agents & promoters, music PR, concert producers, music managers, publishers, lawyers, etc.) were mapped in the City of Manchester, making up 16% of the music ecosystem assets in the city. As before, only businesses with a registered address have been mapped, so the figure gives us a sense of the size of Manchester's music business sub-sector but is not representative of every worker within it. Understanding how many businesses sit within this sub-sector can help Manchester City Council and decision makers to provide direct and relevant support, such as startup support and funding, affordable office space, and business rates relief, to drive growth and expansion of the industry.

The size of the music business sub-sector is similar to that of Cardiff's in terms of booking agents and promoters (15 in Cardiff compared to 16 in Manchester). However, the mapping discovered 19 record labels compared to just 7 in Sound Diplomacy's 2019 mapping of Cardiff. The City of Manchester has the data now to prove that it has a developed and varied music ecosystem. However, it is imperative that those businesses continue to be taken into consideration in any future city-led strategies, marketing and planning. Manchester's reputation for being a hub for live music has the potential to be expanded to also be known as a centre for successful music businesses. This would feed into the delivery of the city's strategic ambitions to become a more prosperous city,[16] driving more inclusive economic activity and playing off Manchester's reputational strengths as a city of music.

Nonprofit and Government Support for the Sector

Figure 9. All 35 Nonprofit and Support Bodies across the Greater Manchester sub-region



35 assets were mapped in the Greater Manchester sub-region that can be categorised as a nonprofit or government support service provider for the sector. This includes Arts Council England, Musicians' Union and Inner City Music. 39% of the assets work across the north-west region, of which over 50% have chosen Greater Manchester for the location of their offices

[16] Manchester City Council (2019a)

thus showing that those learning and working within the music ecosystem in the City of Manchester have access to quality and high levels of support.

The majority of support bodies are located in the centre and towards the south of Manchester in locations that are closest to other clusters of activity (venues, music businesses, etc), and aren't all dedicated solely to music, but are also cultural or educational organisations (International Anthony Burgess Foundation and Arts Council England). The mapped assets also range from charities that centre around refugee support and community engagement (Music Action International) to cross-sector working, bringing together other cultural industries (Hercules Productions). Financial support from Arts Council England has helped ensure these organisations continue to appear and grow in Manchester. Since 2018, the non-departmental government body has invested more than £27million in Manchester's music venues, organisations and artists.[17] This demonstrates continued recognition of the economic and cultural significance of Manchester's music ecosystem from support bodies.

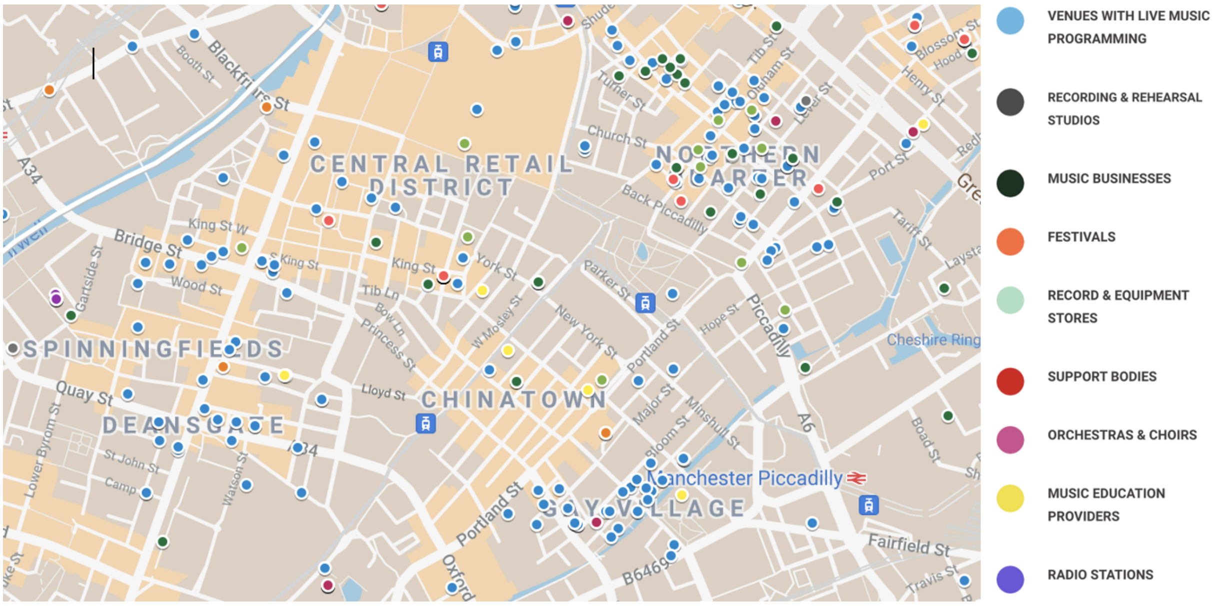
The mapping can only show what support exists, not how much it's used, how relevant it is nor how aware stakeholders are of support available to them. Conversations with those stakeholders in the music industry in the City of Manchester through roundtable discussions or interviews would help reveal this.

Regional distribution

As expected, the Manchester City Centre has the densest cluster of assets, with most in the Northern Quarter and the Gay Village (see image below) and within the category of music venues.

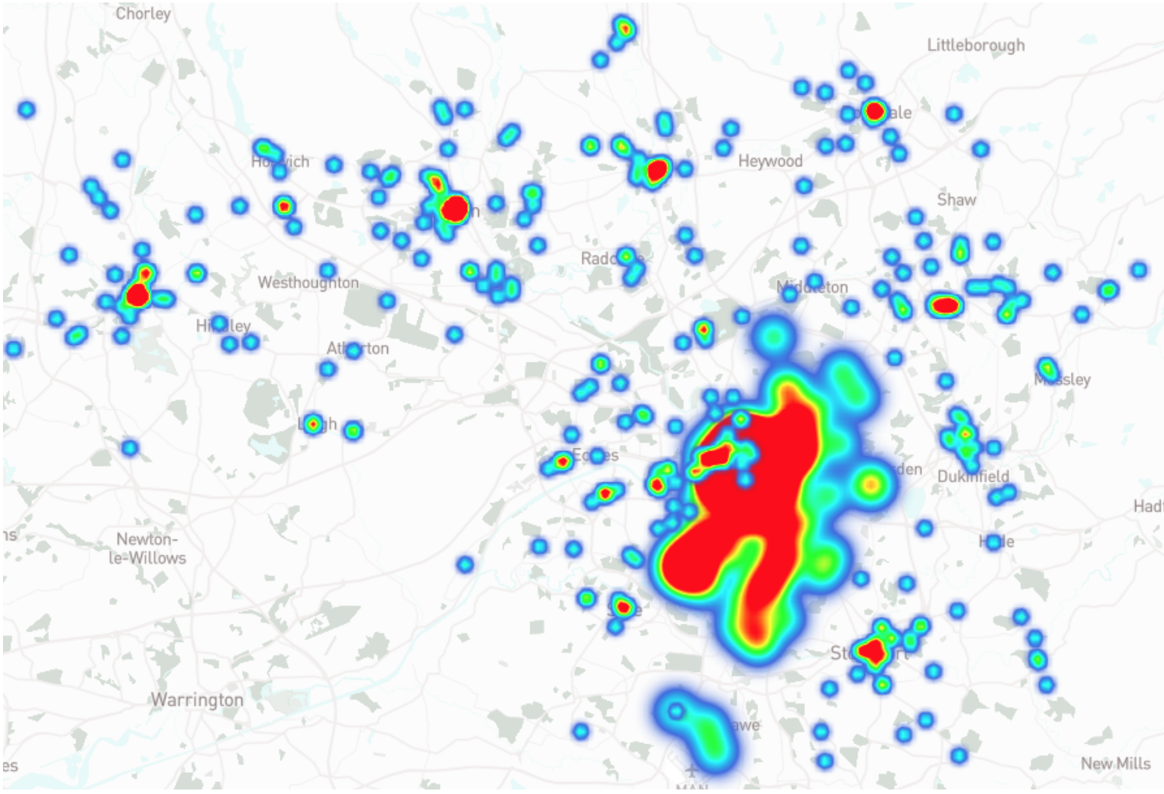
[17] Anecdotal evidence from Arts Council England

Figure 10. Assets mapped in Manchester City Centre



The sub-regional distribution of music assets shows that activity is not solely in the city centre, and that opportunities exist for students, residents and non-music-related businesses in Greater Manchester to engage with the music ecosystem. There are clear clusters of activity in Wigan, Bolton, Oldham, and Stockport, which revolve around music venues. However, in Stockport there is more variety in the offer with radio stations, recording studios and music festivals. The heatmap below clearly shows the clusters across the entire Greater Manchester sub-region.

Figure 11. Heatmap of music assets in Manchester and Greater Manchester



A wider mapping of Greater Manchester (excluding the City of Manchester) would likely reveal even greater diversity in the music offer. The existence of music assets in Greater Manchester not only reinforces the City of Manchester's brand as a hub for music, but also enhances each city and borough's position as individual hubs for residents and visitors of all ages to engage, learn, explore and work within the music ecosystem.

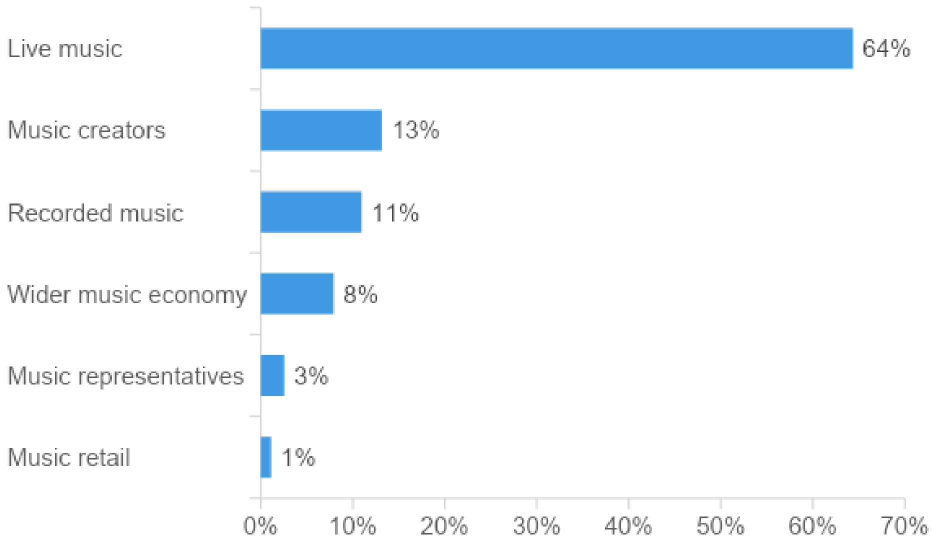
Survey Analysis

As part of the research into the economic value of the Manchester Music sector, Nordicity conducted a survey in partnership with Manchester City Council, Manchester Music City Steering Group and a local consultant. The survey targeted Manchester's music businesses and creators through June and July 2021, asking questions about revenue, employment, and sources of income. The survey was designed to be completed in approximately 15 minutes and respondents were entered into a prize draw as an incentive to drive response rates.

The survey generated 117 responses from Manchester's music businesses and creators. Overall, the survey results provide an indication of the direction of travel for the sector, capturing the general views, experiences and plans for Manchester's music businesses and creatives.

To supplement this data for the economic analysis, financial and employment data for a further 600 Manchester music businesses derived and extrapolated from a triangulation of Companies House data, desk research, consultations and economic modelling was incorporated into various parts of the analysis. This financial and employment data was analysed following UK Music's Music by Numbers Taxonomy. Of these, approximately 64% were from the Live music sector, 13% from Music creators, 11% from Recorded music, 8% from the wider music economy, 3% from music representatives, and 1% from Music retail.

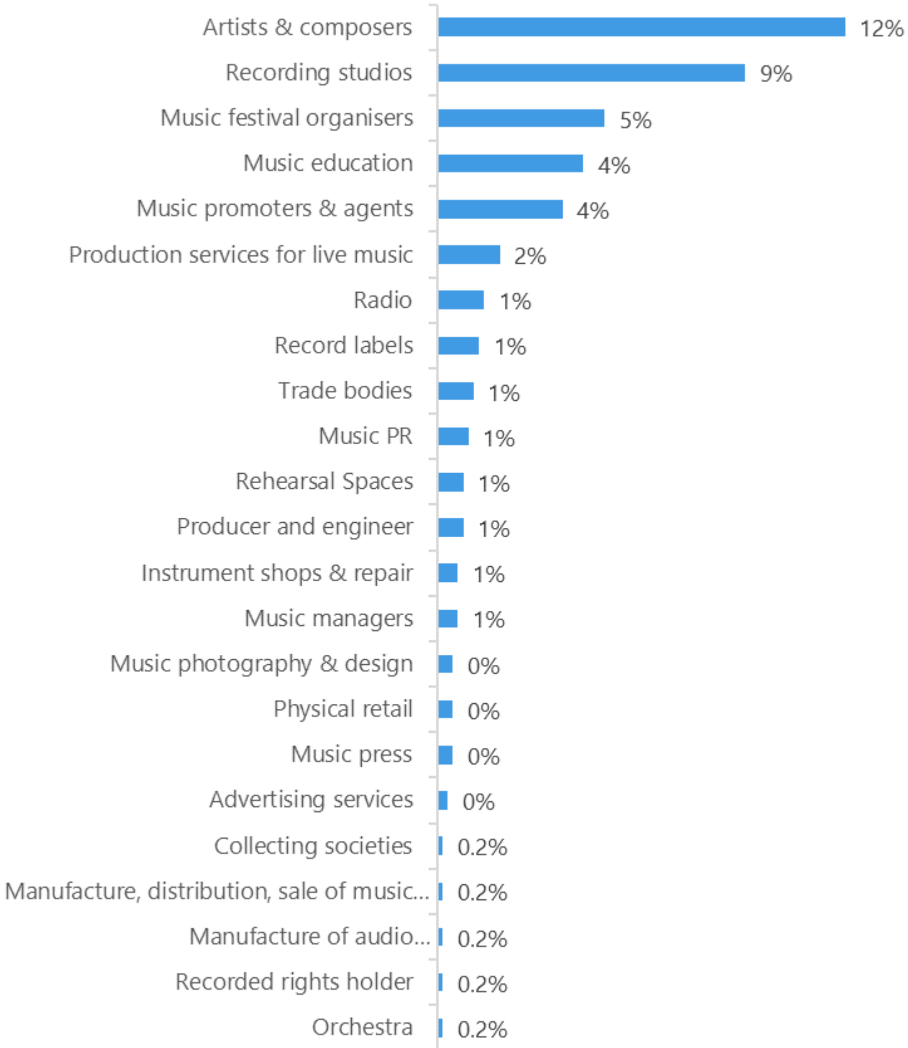
Figure 12. Greater Manchester music businesses and creators by music subsector (Survey respondents and Companies House, using UK Music Music by Numbers Taxonomy level 1)



Source: Nordicity Survey of Manchester music economy 2021, Companies House. n=631

A different breakdown using UK Music's taxonomy level 2 of the Manchester music businesses and creators from the survey and desk research showed artists and composers comprised 12%, recording studios 9%, music festival organisers 5%, music education and music promoters & agents 4% each, and music production services for live music 2%, with the remaining comprising 1% or less each.

Figure 13. Percentage breakdown of all Greater Manchester music businesses and creators types (UK Music Music By Numbers Taxonomy level 2)

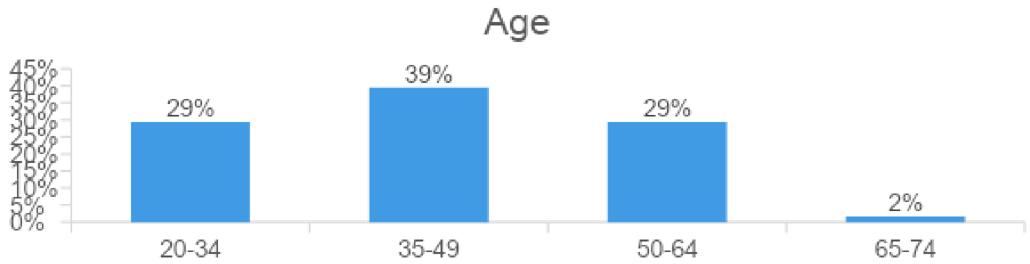


Source: Nordicity Survey of Manchester's Music Economy 2021, Companies House. n=630

The response per music subsector reflected the diverse nature of Manchester's music economy. The survey analysis, Companies House data and mapping analysis illustrate the dominance of live music in Manchester's music ecosystem, accounting for 64% of music creators and businesses assessed. The survey results have also highlighted the variety of stakeholders within Manchester's music industry. This supports the overall understanding of the ecosystem as the mapping was limited to physical infrastructure, and survey respondents have helped demonstrate the range of roles and occupations that exist. The survey results illustrate the diversity of the types of roles in the sector, an understanding of which could support any future music sector skills and business support plans.

The survey respondents reflected a mid-age range of individuals between 20-64 years old, with no respondents aged 19 or younger, and only 2% aged 65 or older.

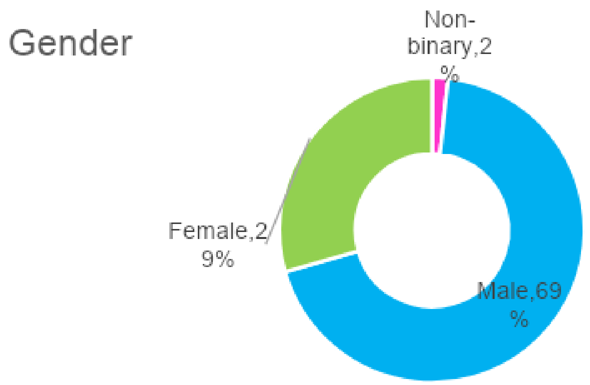
Figure 14. Greater Manchester survey respondents by age



Source: Nordicity Survey of Manchester's Music Economy 2021. n=119

The survey responses reflect a major gender imbalance. 29% of respondents identified as female, 2% identified as non-binary, and 69% identified as male.

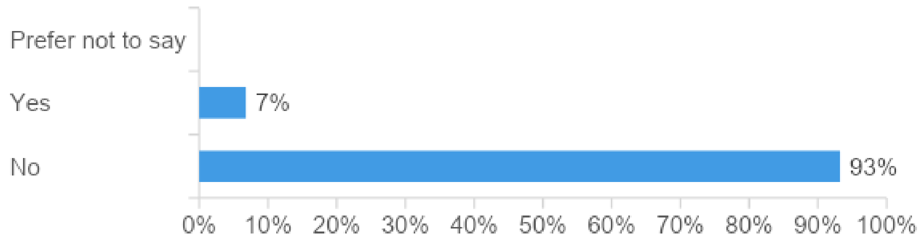
Figure 15. Greater Manchester survey respondents by gender



Source: Nordicity Survey of Greater Manchester's Music Economy 2021. n=119

7% of survey respondents identified as d/Deaf or Disabled, lower than the national average where 17% of the UK adult population is affected by hearing loss[18] and over 18% have a limiting long term illness, impairment or disability.[19]

Figure 16. d/Deaf or Disabled survey respondents in Greater Manchester

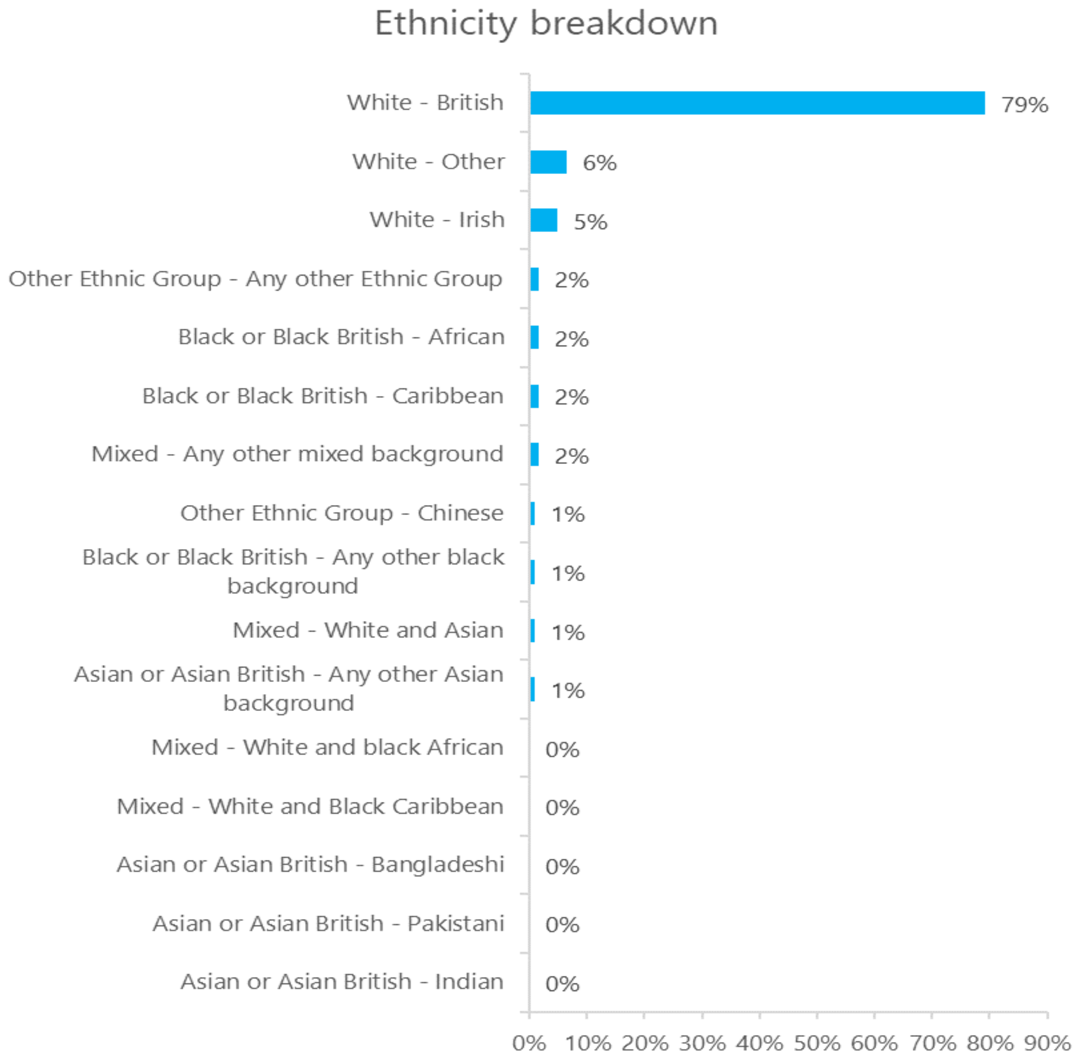


Source: Nordicity Survey of Manchester's Music Economy 2021. n=118

One-in-ten survey respondents identified as an ethnicity other than White whilst the vast majority of survey respondents identified as White-British (79%), 6% White-Other, and 5% White-Irish. This suggests that Greater Manchester's music industry is less white than that of the 'music, performing and visual arts' sub-sector of the creative industries, which is 93% white.[20] However, this is not as reflective of the population of Greater Manchester, which according to the Census was 83.7% White (the city of Manchester itself is only 66.5% White). [21]

[18] Hearing Link (2021)
[19] Employers' Forum on Disability.
[20] HM Government (2021), DCMS Sectors Economic Estimates 2021: Employment, 2019 to June 2021, Table 2: Employment (number of filled jobs, thousands) in the DCMS sectors, subsectors, SIC codes and creative and digital occupations by various demographic characteristics : January 2019 to December 2019.
[21] Office for National Statistics (2013), 2011 Census: Key Statistics and Quick Statistics for local authorities in the United Kingdom - Part 1 - Office for National Statistics, KS201UK Ethnic group, local authorities in the United Kingdom, 11 October 2013.

Figure 17. Survey respondents by ethnicity in Greater Manchester

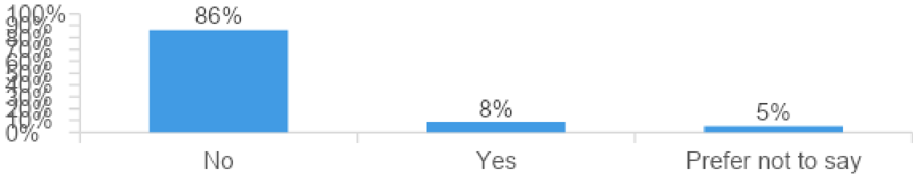


Source: Nordicity Survey of Manchester's Music Economy 2021. n=125

8% of survey respondents identified as LGBTQIA+, 86% did not, and 5% preferred not to say, compared to 2.7% of people over 16 years of age identifying as LGB in the UK as a whole and 2.2% in the North West. Direct comparisons cannot be made because the ONS data is not inclusive of 'TQIA+').[22]

[22] ONS (2019)

Figure 18. LGBTQIA+ survey respondents in Greater Manchester



Source: Nordicity Survey of Manchester's Music Economy 2021. n=118

The question of socioeconomic background in the survey used National Statistics socio-economic classification (NS-SEC) classes. Over one third of survey respondents (36%) came from homes with parents in senior professional and management positions (i.e. NS-SEC 1) and a further 24% came from homes with middle and lower professional and managerial / administrative positions (i.e. NS-SEC 2), together, this 60% represents those coming from affluent backgrounds. Only 11% came from homes with semi-routine or routine occupations and 3% from homes with unemployment (i.e. NS-SEC 6-8), together, this 14% represents those from working class or unemployed family backgrounds. In between, those from families where the parents were from intermediate occupations or were self-employed (i.e. NS-SEC 3-5).

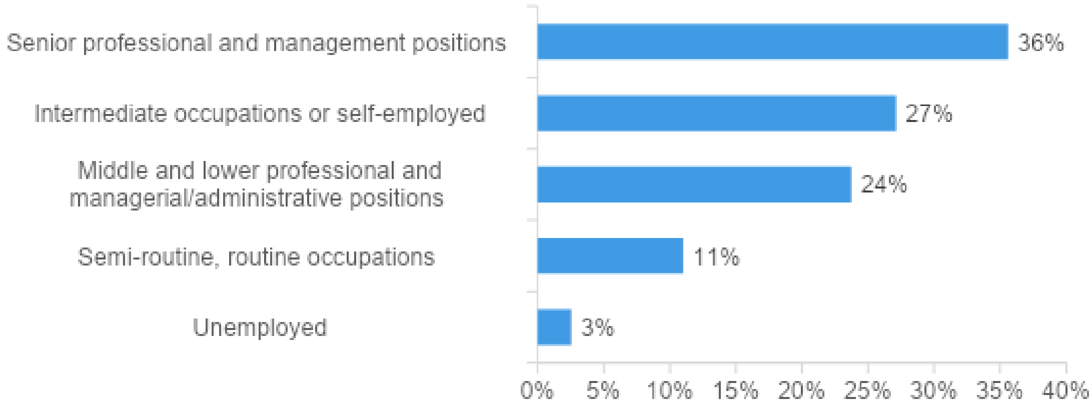
Academic analysis of the Office of National Statistics' quarterly Labour Force Survey data in combination with DCMS Creative Industries Estimates show that using the NS-SEC classes, affluence is very strongly over-represented in the creative industries, and this situation is particularly bad in music. Seminal analysis by Dave O'Brien shows that those from affluent backgrounds constitute 50% of the Creative Industries workforce, and 59% of musicians, whereas, they only constitute 29% of the population as a whole. Conversely, those from working class backgrounds only constitute 18% of the Creative Industries workforce, and even less among musicians at 10%, whereas they constitute 35% of the population.[23]

Therefore, the survey results suggest that the Greater Manchester music workforce is equally skewed to those from affluent households as the national situation, though there is significantly more representation from working class households in Greater Manchester than

[23] Dave O'Brien, Daniel Laurison, Andrew Miles and Sam Friedman (2016)

nationally at four percentage points extra (but this is still 21 percentage points below representation in the population as a whole).

Figure 19. Survey respondents by socioeconomic background in Greater Manchester

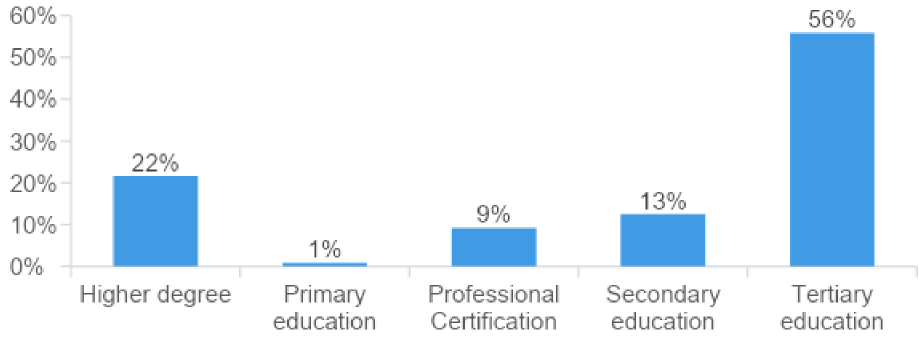


Source: Nordicity Survey of Manchester's Music Economy 2021. n=118

A majority of survey respondents had a tertiary education (56%) i.e. further or higher education, with an additional 22% who had a higher degree and 9% with a professional certification; only 14% had only primary or secondary education as their highest level of attainment. DCMS data for 'music, performing and visual arts' indicates that nationally 23% have secondary education or less as their highest level of attainment.[24] This suggests that the Greater Manchester music industry workforce responding to the survey has a higher degree of education than the national average.

[24] HM Government (2021), DCMS Sectors Economic Estimates 2021: Employment, 2019 to June 2021, Table 2: Employment (number of filled jobs, thousands) in the DCMS sectors, subsectors, SIC codes and creative and digital occupations by various demographic characteristics : January 2019 to December 2019.

Figure 20. Survey respondents by highest level of education obtained (Greater Manchester)

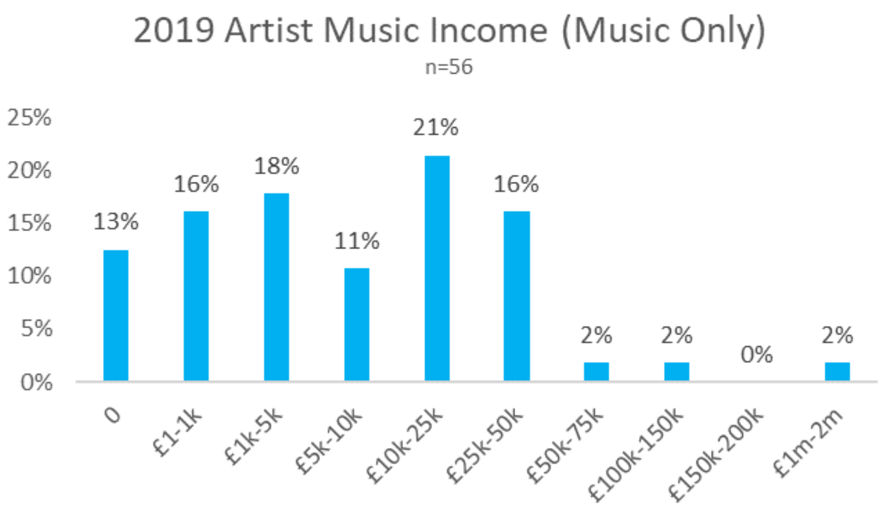


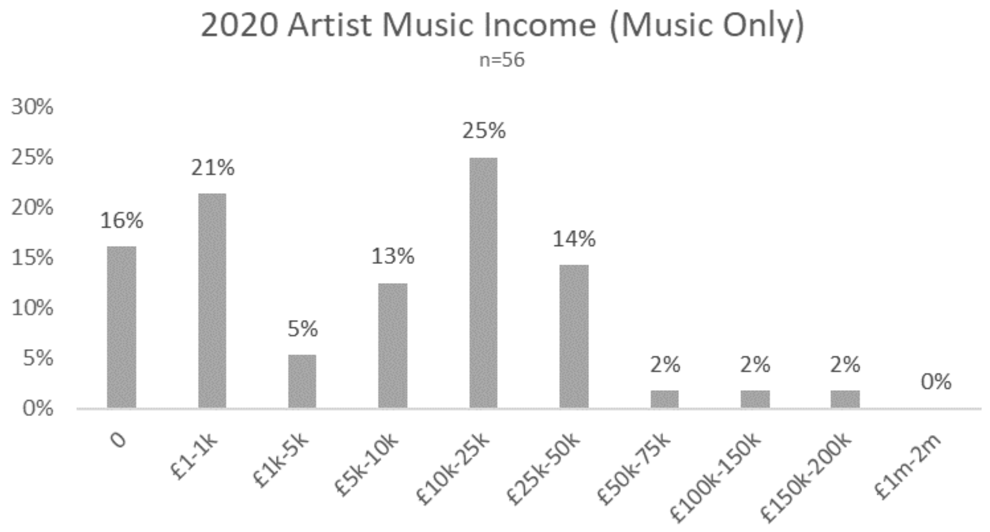
Source: Nordicity Survey of Manchester's Music Economy 2021. n=120

Music Artist Personal Income

There have been noticeable changes between individual artists' incomes between 2019 and 2020, illustrated by the 56 artists responding to this question of the survey. This mirrors a downturn in economic activity as a result of COVID-19, as shown below:

Figure 21. Greater Manchester artists' income from music activities 2019 and 2020 (GBP £)





Source: Nordicity Survey of Manchester's Music Economy 2021. n=56

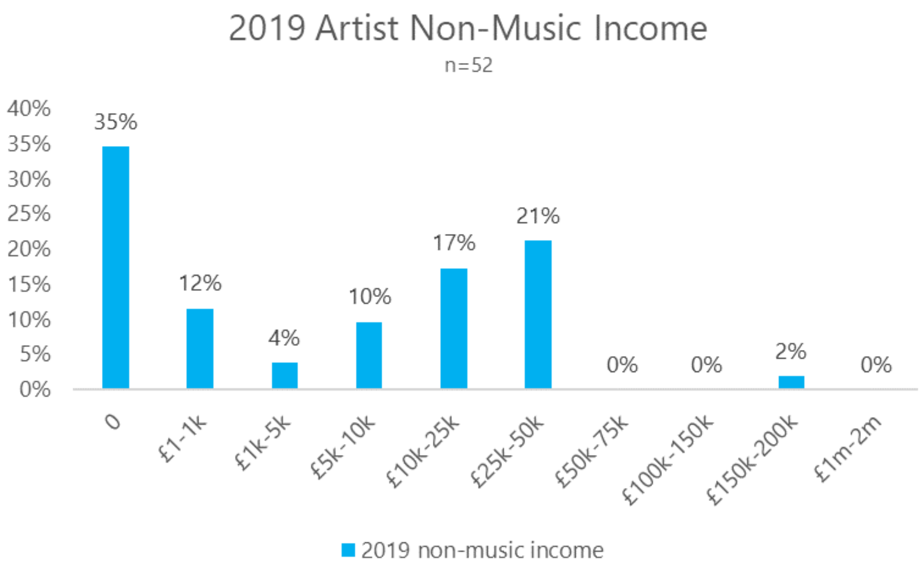
The graph above highlights an increase in the number of artists surveyed who earned a music-related income of £5,000 to £25,000. Despite a slight reduction in those earning within the £25,000 - £50,000 range, the figures also show that earnings of £50,000 and above remained consistent. This illustrates how the COVID-19 pandemic may not have created full-scale reductions in music-related income equally across all parts of the sector. For some, the pandemic may have, ironically, provided a window of time for artists with jobs in other sectors to develop their music-related work, or increase their use of online platforms and even revenues. Overall, the impact of the pandemic however had been devastating for most.

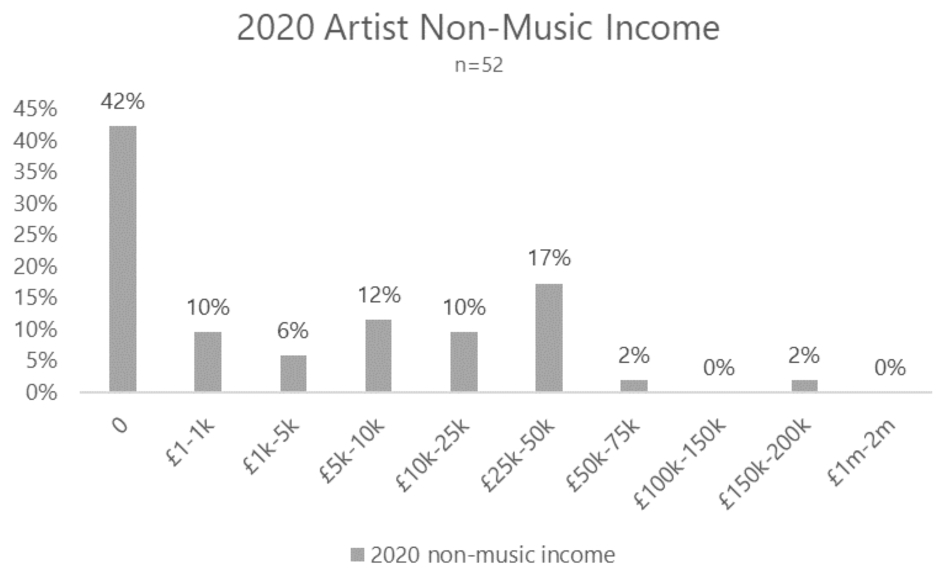
The income levels reflect artists of different types. The lower levels of income reported below £10,000 reflect many semi-professional and part-time music creators. It can also be seen that there was an increase in some survey respondents earning nothing from their music income in 2020 and the majority of respondents earned less than £10,000 in 2020. This aligns with the findings that there was also an increase in survey respondents making no income from non-music related activities (see figure below), which may be attributed to the impact of COVID-19.

The impact of the COVID-19 pandemic has been severe and highly damaging for Manchester's music sector. These impacts were particularly difficult for a city renowned for its live sector which came to a complete shutdown. Many music economy workers were put on the government's furlough scheme whilst some industries temporarily ceased altogether during nationwide lockdowns. This flags an issue for many music creators whose music income is insufficient to sustain a career at present, and therefore need to work additional jobs to supplement their income.

Income and expenditure was analysed for music creators (artists) and music businesses. Freelancers are included within music businesses as micro-enterprises, and employees are captured within the activities of music businesses. This approach helps mitigate against double-counting in the analysis.

Figure 22. Greater Manchester music artists' income from non-music activities 2019 and 2020 (GBP £)

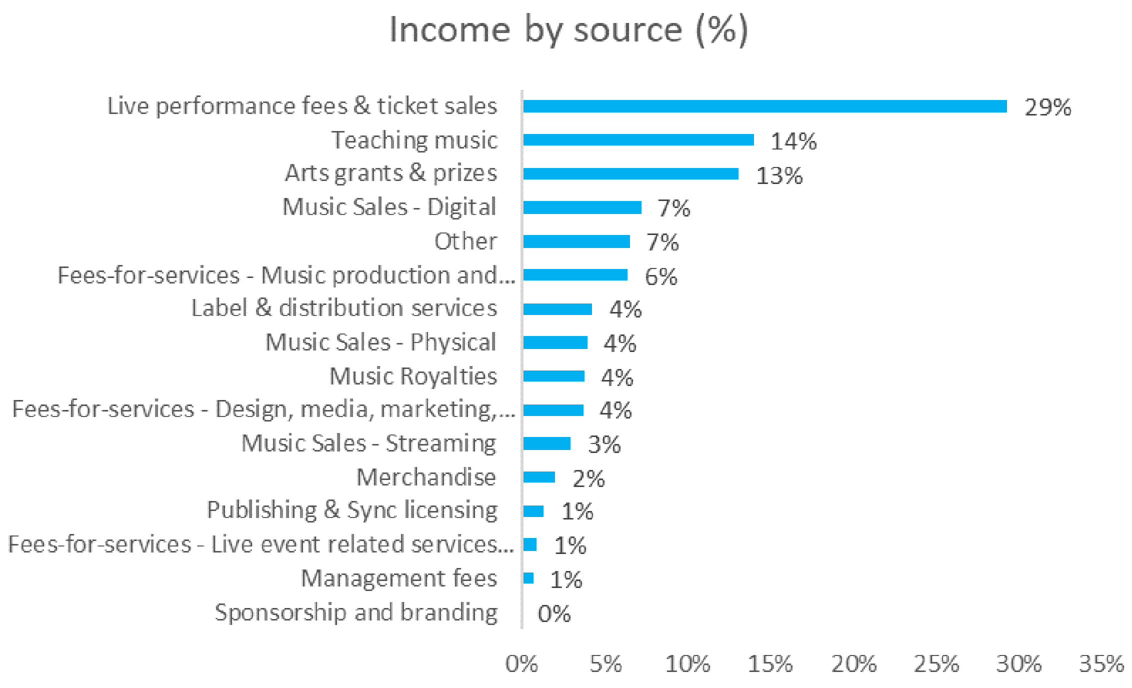




Source: Nordicity Survey of Manchester's Music Economy 2021. n=52.

Driven by a vibrant live music sector, live performance fees and ticket sales were the most significant income source for artists in Manchester (29%), followed by teaching music (14%) and arts grants and prizes (13%). Music sales accounted for 7% of artist income, followed by fees for services in music production (6%), and label distribution services, physical music sales, music royalties, fees-for-services related to design media and marketing 4% each, music sales 3% and merchandise 2%.

Figure 23. Greater Manchester music artist income from music by source (%)



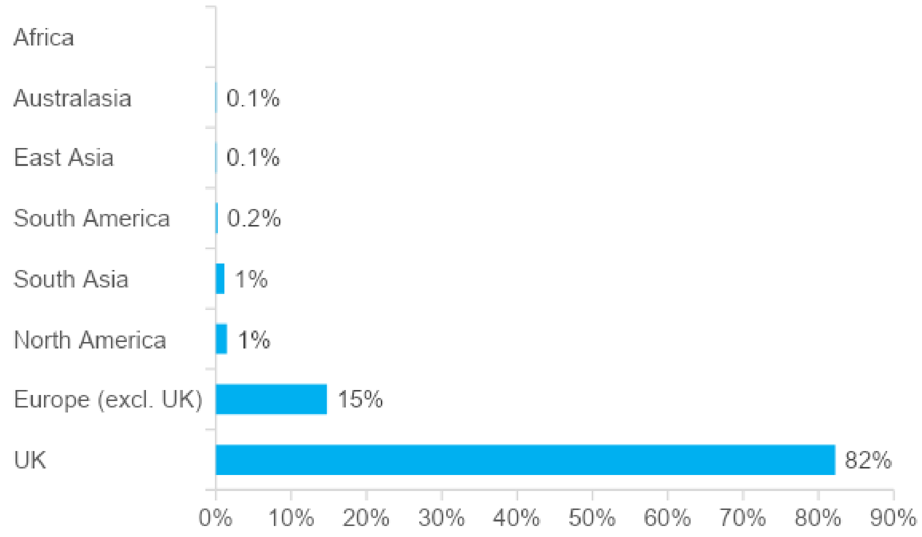
Source: Nordicity Survey of Manchester's Music Economy 2021. n=58

The vast majority of Greater Manchester music artist income was generated domestically. Of the responding 58 artists, 82% derived from the UK and 18% from exports (including 15% from Europe and 1% from North America and South America each). This suggests that exports could be an important growth area of focus for Manchester's music businesses.

The latest Music By Numbers data from UK Music indicate that Live Music exports from the UK in 2020 were at £86 million and reported that the European Commission stated that UK acts "dominated the European panorama" in 2019.[25]

[25] UK Music (2020a) "Music By Numbers 2020"

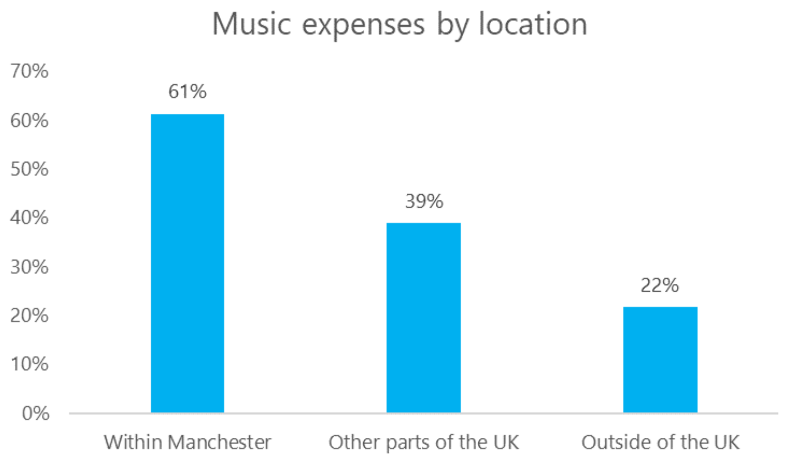
Figure 24. Greater Manchester music artists' income from music by geography (%)



Source: Nordicity Survey of Manchester's Music Economy 2021. n=58

Manchester's music economy spends a majority of its expenditure locally. Of the total expenditure made by the 58 music artists responding to the survey, 61% was made within Manchester, 39% was made across other parts of the UK, and 22% made outside the UK. The high degree of local spending reflects strong supply chains which support economic growth across the local area. In the absence of comparable data on music expenditure and supply chains in other cities, anecdotal evidence suggests the music economy is positioned from a strength of resilience. It also suggests an opportunity for Manchester's music economy to expand its supply chains across the country and internationally, affording room for growth and diversification across the value chain.

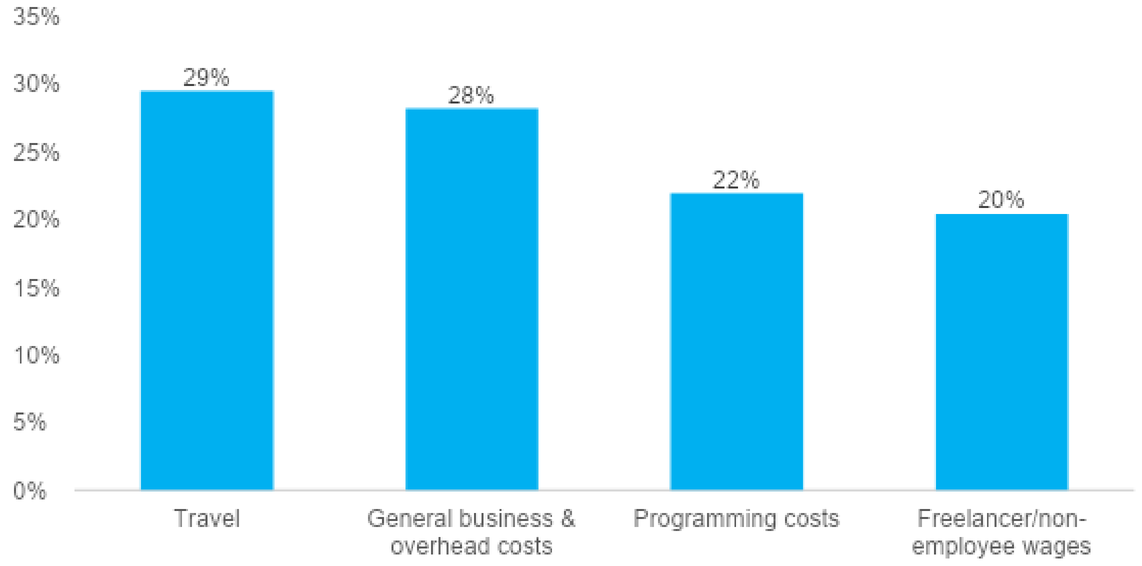
Figure 25. Greater manchester music artist expenses for music by location/destination (%)



Source: Nordicity Survey of Manchester's Music Economy 2021. n=58

Travel costs and general business and overhead costs are the most significant expenditures according to the 58 music artists responding to the survey. Music expenditure was balanced between travel costs including transportation and accommodation (29%) and general business overheads such as professional services, rent, accounting and legal (28%). The next most significant expenditures were programming costs borne by artists such as expenses related to booking shows, paying other artists and investing in artist development (22%), as well as paying freelancers for various services (20%).

Figure 26. Greater Manchester music artist expenditure on music by type (%)



Source: Nordicity Survey of Manchester's Music Economy 2021. n=28

Music Businesses

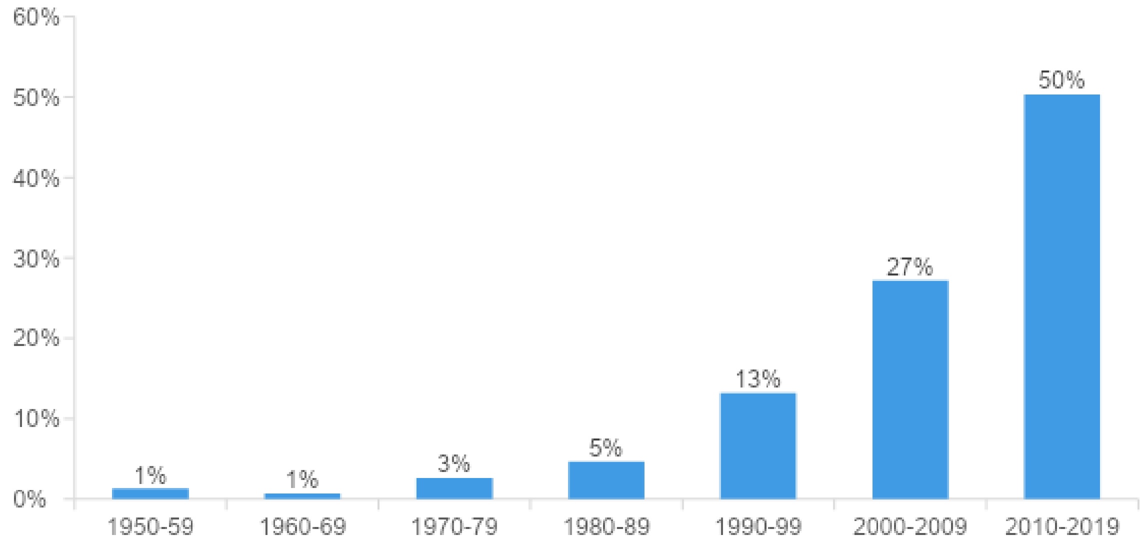
Whilst the music heritage of Manchester is significant, many of the businesses forming the foundation for the music sector have emerged since the turn of the millennium. This accounts for 77% of the 151 music businesses mapped through the survey and desk research. Music businesses include all the businesses (such as labels, managers, publishers, studio and venue operators, event organisers, etc.) and all of the assets (such as venues, facilities, studios and other physical infrastructure).

Half of the 151 music businesses analysed were founded within the last decade between 2010-2019, whilst just over a quarter (27%) were founded in the decade prior between 2000-2009, and 15% in the ten years prior from 1990-1999. Only 8% of companies reported being founded before 1989. By comparison nationwide, over the last twenty years the number of UK businesses increased by 72% from 3.5 million in 2000 to 6 million in 2020.[26] However, between 2017 and 2018 there was a nationwide 0.5% decrease, with the number of

[26] Business population estimates for the UK and regions 2020: statistical release. Department for Business, Energy & Industrial Strategy. Published 8 October 2020.

businesses down by 27,000.[27] The age of music businesses in Greater Manchester was analysed using data from Companies House.

Figure 27. Year Greater Manchester music businesses were founded (of 151 businesses)

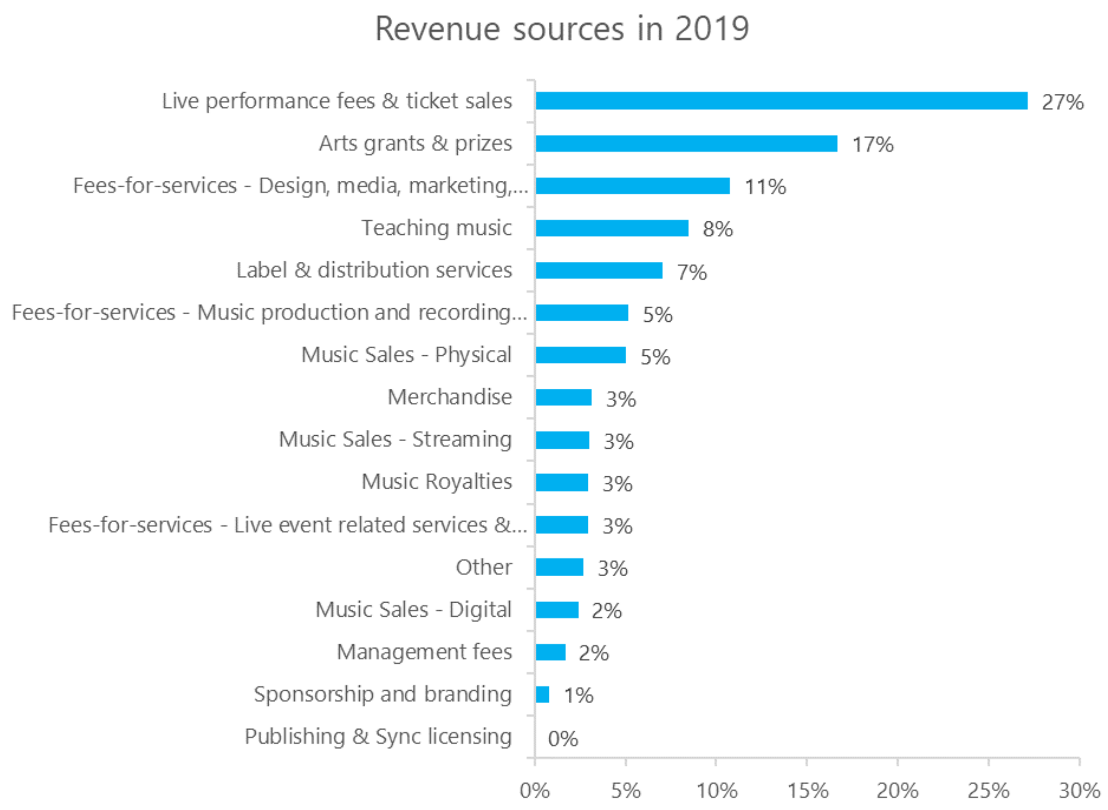


Source: Nordicity analysis of Greater Manchester music businesses, Companies House. n=151

The most significant source of revenue for music businesses in Greater Manchester was derived from live performance fees and ticketing (27%), followed by arts grants and prizes (17%), fees for services related to design, media and marketing (11%), teaching music (8%), label and distribution services (7%), and fees for services related to music production, and physical music sales (5% each).

[27] Ibid.

Figure 28. Greater Manchester music business revenue sources in 2019



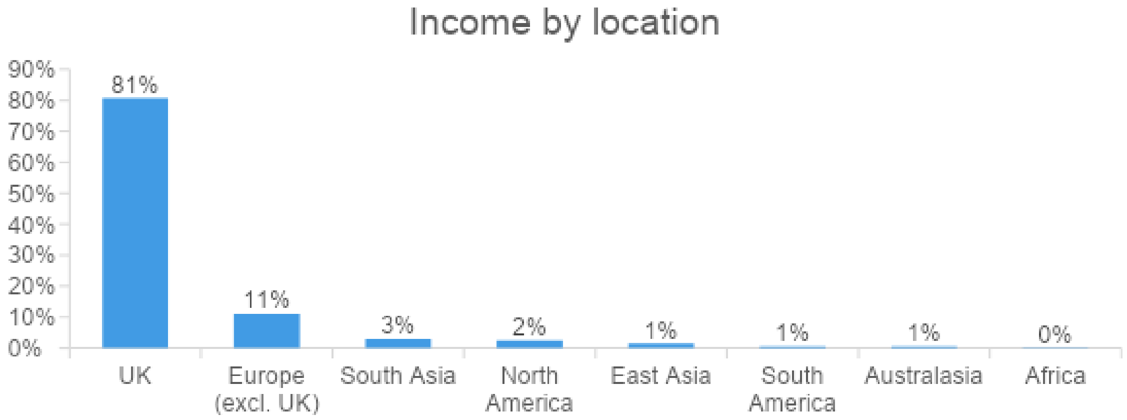
Source: Nordicity Survey of Manchester's Music Economy 2021. n=55

Nationally, the UK music industry had a total export value of £2.9 billion in 2019[28] and an untold value as a calling card to the world.[29] Whilst nationally the UK overall is a net exporter of music, in Greater Manchester the vast majority of music business income reported by survey respondents was domestic (81%), and only 19% was derived from exports (primarily Europe at 11%). Whilst comparator data of other cities for export is limited, the dominance of London as the national (and indeed a global) centre of music publishing means that much of the international export activity is naturally concentrated in the Southeast of England. In addition, survey data and consultations with sector stakeholders suggests that the very strength of Manchester's live music sector gives it a more domestic orientation, whereby exports are dependent primarily on live touring internationally. As a result, the Manchester music value chain may be more exposed to changes in the ability to travel and tour, which

[28] Total export revenue equals the total receipts generated from music within all sectors from outside the UK.
[29] UK Music. 2021.

might otherwise be offset to some extent through publishing or digital activities - both domestically and abroad.

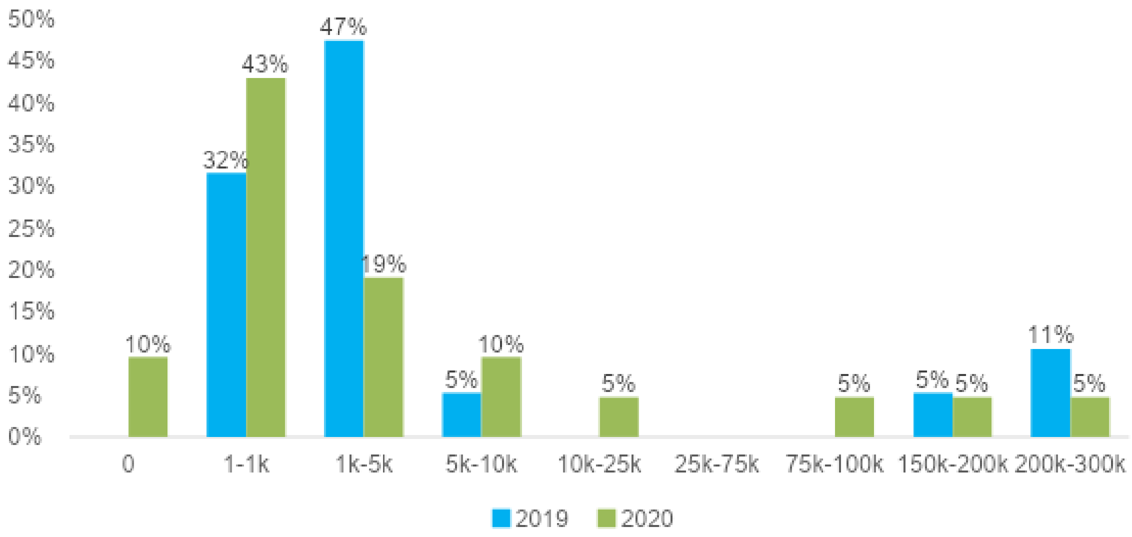
Figure 29. Greater Manchester music business income by geography



Source: Nordicity Survey of Manchester's Music Economy 2021.

Overall, music business expenditure decreased from 2019 to 2020 at the onset of COVID-19.

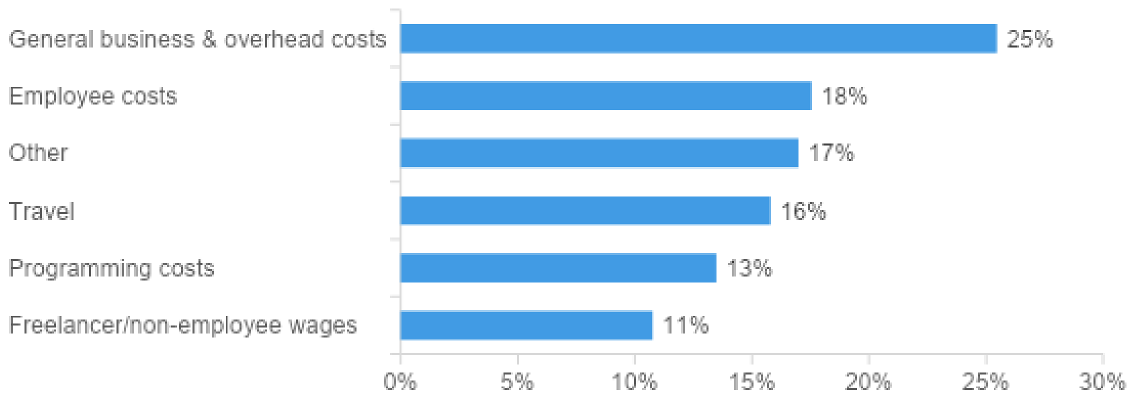
Figure 30. Greater Manchester music business expenditure per annum (GBP £)



Source: Nordicity Survey of Manchester's Music Economy 2021. n = 19 for 2019, n = 21 for 2020

The most significant expense for Greater Manchester music businesses responding to the survey was general business and overhead costs (25%), followed by employee costs (18%), travel costs (16%), programming costs (13%), and freelancer fees or non-employee labour costs (11%). Other expenditure types accounted for 17%.

Figure 31. Music business expenses breakdown

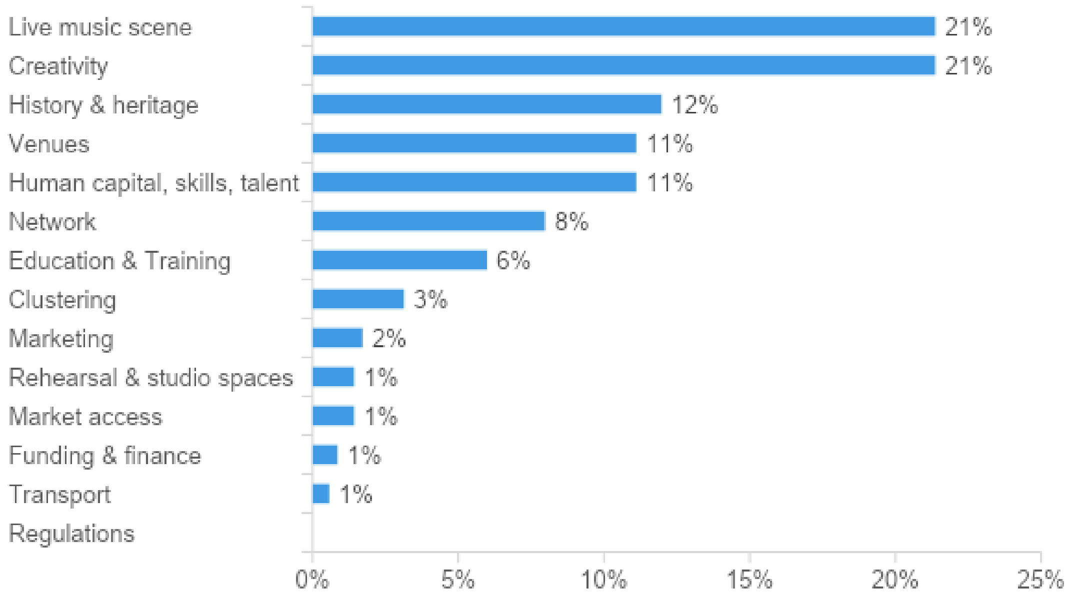


Source: Nordicity Survey of Manchester's Music Economy 2021. n = 7

Perceived Strengths and Weaknesses of the Manchester Music Sector

The greatest perceived strengths of Manchester's music ecosystem as identified by survey respondents was its live music scene and the local creativity jointly (21% each). The history and heritage of music in Manchester was identified as the third biggest perceived strength (12%), followed by the city's venues and its people (human capital, skills and talent) (11% each). The network of Manchester's music industry ecosystem was identified as a moderate strength (8%). Survey respondents were given the option to identify three strengths and three weaknesses of the Manchester Music ecosystem each, the results of which can be seen below:

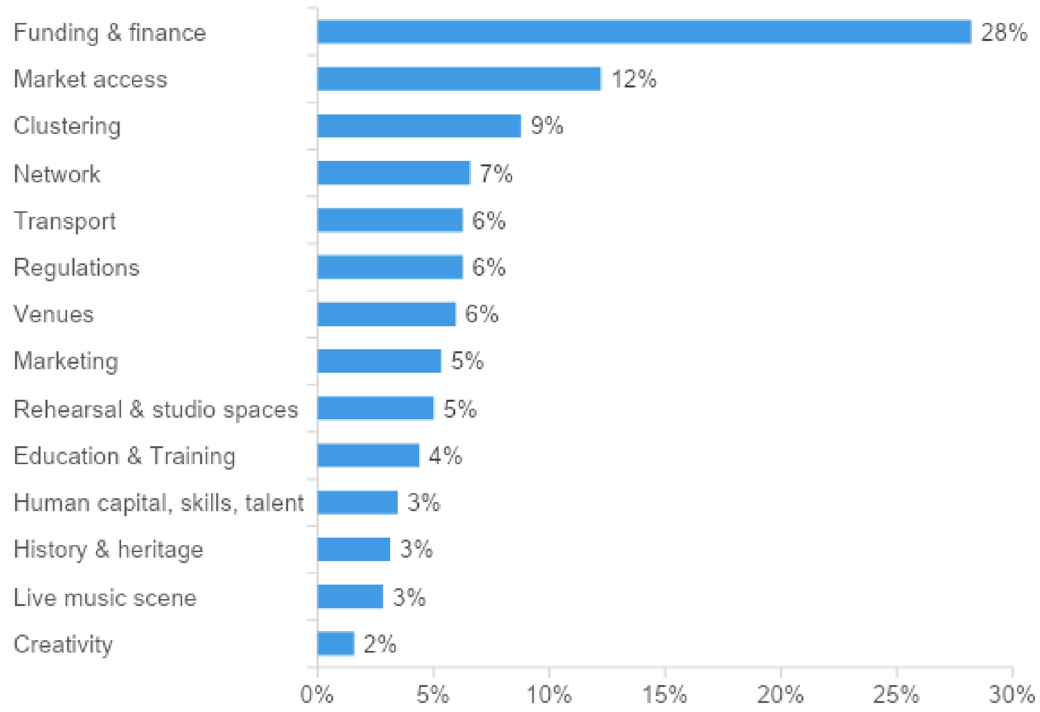
Figure 32. Perceived strengths of Manchester's Music Ecosystem



Source: Nordicity Survey of Manchester's Music Economy 2021. n=117

The greatest perceived weaknesses facing Manchester's music ecosystem identified by survey respondents correlate with the city's strengths. Funding and finance was identified as the greatest weakness by far (28%), followed distantly by market access (12%) and clustering (9%), amongst other lesser-perceived weaknesses.

Figure 33. Perceived weaknesses of Manchester's Music Ecosystem



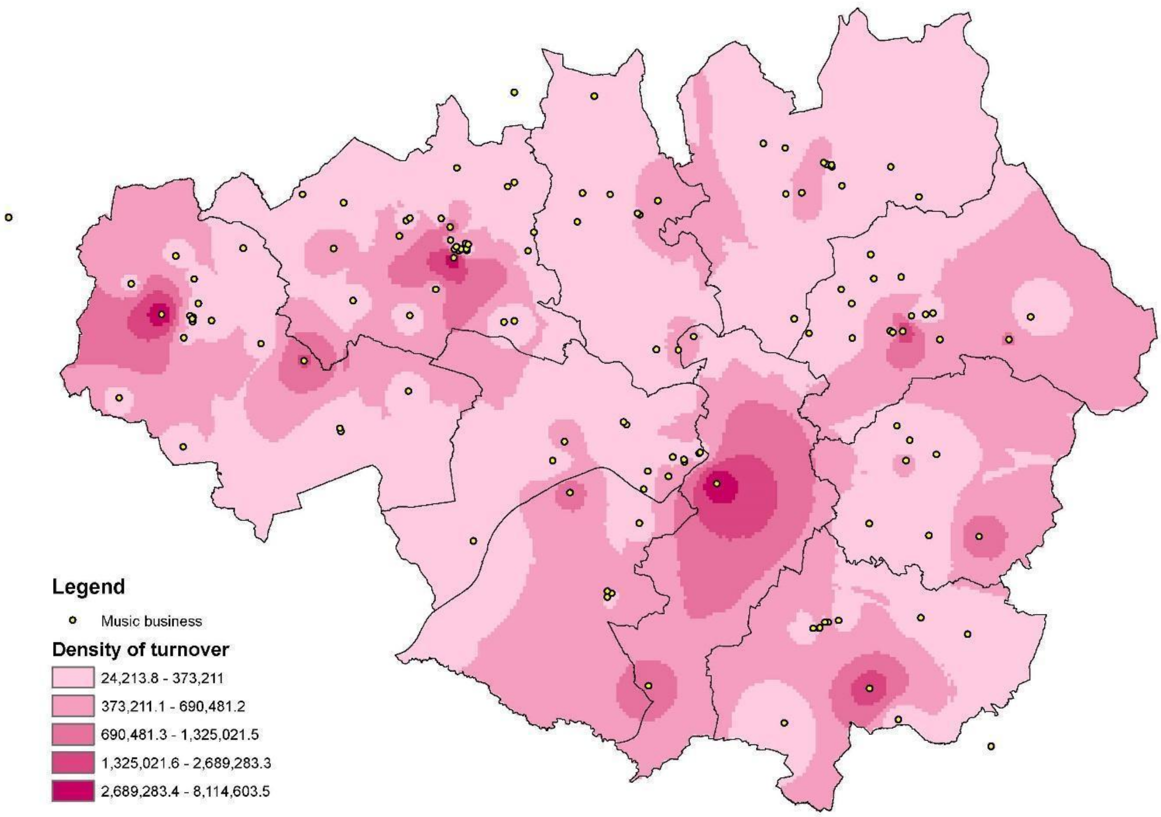
Source: Nordicity Survey of Manchester's Music Economy 2021. n=117

In the case of perceived strengths, the live music scene and creativity were the most commonly cited responses. Meanwhile, the most frequent weakness identified was funding and finance, with market access also being a recurrent response. This suggests economic barriers in the way for musicians and music businesses to enter and grow within the sector. There were also divisions across a number of responses for some characteristics, such as networking, which was perceived as both a strength and a weakness, suggesting that some people felt well connected within the industry whilst others found industry networks more difficult to navigate. Consultations with industry professionals noted the heightened challenges when considering intersectionality and that such barriers, whilst spanning across the population, can be significantly greater for people from underrepresented groups.

Music Industry Revenue

Survey respondents were asked about their revenue generation. Using postcode data this was then mapped, the results of which can be seen below with areas in dark magenta having the highest revenue:

Figure 34. Map depicting revenue density



Source: Nordicity analysis, Nordicity Survey of Manchester's Music Economy 2021, Companies House. n =

The map highlights the density of music economy revenue in Manchester. These revenues include the total income generated by music businesses (including freelancers) from their music industry activities in 2019. The greatest density of music industry revenue is displayed by the darker regions of the map - primarily visible in Manchester City centre at the centre of the map, followed by two secondary clusters of revenue in the west of the city and one secondary cluster in the southeast. In contrast, areas in the north of Manchester have amongst the lowest levels of music industry revenue, followed by the east and southwest of the city. Perhaps unsurprisingly, the areas with the highest revenue are the city and town centres of Manchester, Wigan, Bolton, Stockport. These findings align with the mapping analysis, which revealed clear clusters of industry activity within these locations.

As with the mapping, the survey results highlight both the centres of economic activity and gaps in sector activity in parts of the conurbation. Whilst music activities tend to cluster in the more central and urban areas of cities around the world, it raises important questions about the accessibility to music and culture, but also the potential for different kinds of activity in outer regions and beyond. The centricity of Manchester's music activities may correlate to the low perception rating of both transport and market access by survey respondents, although analysis of a wider dataset would be required to explore this further.

The results of the survey correlate with the findings from the policy review and mapping analysis, illustrating a breadth of music activity taking place across Manchester. Whilst Manchester boasts a strong degree of private and public sector leadership, there is a need for a joined up approach involving stakeholders from across the music economy to strengthen what exists and cultivate further development and steps towards ever-greater inclusive growth and sustainability.

Economic Impact Analysis

In the following section, we provide the results of our analysis of the contribution that the music sector makes to the economies of the City of Manchester (Manchester), and Greater Manchester. We first examine the direct economic impact. This is followed by analyses of the total economic impacts within Manchester and Greater Manchester, which is inclusive of the indirect and induced economic impact of the local music sector.

Summary of the Economic Impact of Manchester's Music Economy

The music ecosystem is a major contributor to the economy. The **total economic impact** of Greater Manchester's music ecosystem was £469 million in Gross Value Added (GVA) and 11,270 FTE jobs (FTEs). This comprised a total economic impact of £390 million in GVA and 9,590 FTEs from the **music sector**, £63 million in GVA and 1,340 FTEs from **music tourism** and £16 million in GVA and 340 FTEs from the **night-time economy**.

- The **direct economic impact** of Greater Manchester's music ecosystem, which constituted the largest part of the total economic impact, was £275 million in direct GVA and 7,900 in direct FTEs. This comprised a direct economic impact of £230 million in GVA and 6,850 in FTEs from the music sector, £36 million in GVA and 830

FTEs from music tourism and £9 million in GVA and 220 FTEs from the night-time economy.

- The **indirect economic impact** of Greater Manchester's music ecosystem was £151 million in GVA and 2,560 in FTEs. This comprised an indirect economic impact of £125 million in GVA and 2,130 FTEs from the music sector, £21 million in GVA and 340 FTEs from music tourism and £5 million in GVA and 90 FTEs from the night-time economy.
- The **induced economic impact** of Greater Manchester's music ecosystem was £43 million in GVA and 810 FTEs. This comprised an induced economic impact of £35 million and 610 FTEs from the music sector, £6 million and 170 FTEs from music tourism and £2 million in GVA and 30 FTEs from the night-time economy.

For Manchester City itself within the wider conurbation, the **total economic impact** of Manchester's music ecosystem was £308 million in Gross Value Added (GVA) and 6,830 FTEs. This comprised a total economic impact of £241 million in GVA and 5,450 FTEs from the music sector, £53 million in GVA and 1,090 FTEs from music tourism and £14 million in GVA and 290 FTEs from the night-time economy.

- The **direct economic impact** of Manchester's music ecosystem, which constituted the largest part of the total economic impact, was £178 million in direct GVA and 4,520 in direct FTEs. This comprised a direct economic impact of £139 million in GVA and 3,610 in FTEs from the music sector, £31 million in GVA and 720 FTEs from music tourism and £8 million in GVA and 190 FTEs from the night-time economy.
- The **indirect economic impact** of Manchester's music ecosystem was £107 million in GVA and 1,870 in FTEs. This comprised an indirect economic impact of £84 million in GVA and 1,490 FTEs from the music sector, £18 million in GVA and 300 FTEs from music tourism and £5 million in GVA and 80 FTEs from the night-time economy.
- The **induced economic impact** of Manchester's music ecosystem was £23 million in GVA and 440 FTEs. This comprised an induced economic impact of £18 million and 350 FTEs from the music sector, £4 million and 70 FTEs from music tourism and £1 million in GVA and 20 FTEs from the night-time economy.

Types of economic impact

Direct impact refers to the employment and gross value added (GVA) generated directly within the industries and sub-industries comprising the music sector.

Indirect impact refers to the increase in employment and GVA that occurs at businesses within the music sector's upstream supply chain, when they provide supplies and services to the music sector.

Induced impact refers to the increase in employment and GVA that occurs among businesses across the wider economy when workers employed directly within the music sector and its supply chain re-spend their incomes on consumer goods and services (eg. housing, groceries, leisure and entertainment).

Total impact refers to the sum of the direct, indirect and induced impacts.

Overview of approach

The economic impact analysis adopted a 'top-down' secondary data approach to estimate the direct economic impact of the music sector in Manchester and Greater Manchester due to limitations of industry data available for a 'bottom-up' primary data approach. This approach leverages UK Music's Music by Numbers 2020 study's estimates of the direct employment and GVA generated in the UK by the music sector, as depicted in Figure 35. It also leverages the economic data published by UK Music for Greater Manchester's live music sub-sector and found in the Greater Manchester Music Review 2019.

Following this approach, the sector is broken down into six sub-sectors as defined by UK Music:

1. Music creators
2. Live music and music tourism
3. Recorded music
4. Music publishing
5. Music representatives
6. Music retail

Nordicity conducted a combination of primary and secondary research to estimate how much of the UK-wide impact could be attributed to Manchester and Greater Manchester. In other words, each jurisdiction's share percentage share of the UK-wide impact was estimated based on their percentage share of workforce and other indicators that have a higher correlation with the geographic distribution of music sector employment and economic activity than population on its own.

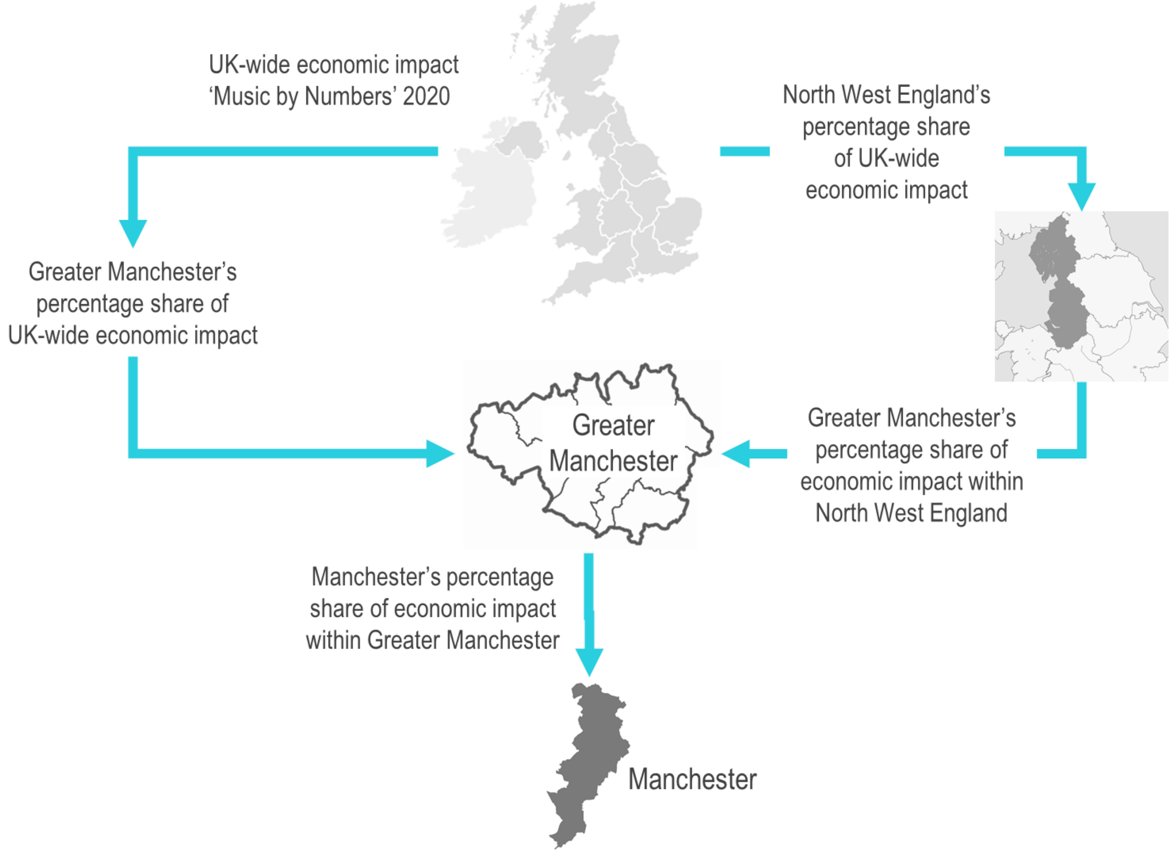
The advantage of the top-down approach is that it ensures that the estimates for Manchester and Greater Manchester are consistent with the UK-wide figures found in Music by Numbers as well as the statistics for Greater Manchester found in the Greater Manchester Music Review 2019. As this method uses statistics from Music by Numbers, it also means that the economic impact estimates for Manchester and Greater Manchester can be readily updated on an annual basis without the need for significant primary research, a task we recommend Manchester City Council do.

Depending on the data available, in some cases, Nordicity first estimated the portion of the UK-wide economic impact that could be attributed to North West England, and then proceeded to estimate Manchester and Greater Manchester's share of this North West England impact. As the major music city in the North of England, Manchester contributes to the impact seen across the North West.

The primary research consisted of interviews and data collection from both national and regional music industry trade groups and organisations to obtain information on what portion of their members or their members' business activity or employment could be attributed to Manchester, Greater Manchester or North West England.

The secondary research largely consisted of the sourcing and review of related economic data from the Office for National Statistics (ONS).

Figure 35. Overview of top-down approach to economic impact analysis



Direct economic impact

In total, the music sector generated an estimated 6,850 FTEs of direct employment and £230m in direct GVA for the Greater Manchester economy in 2019. This estimate of employment includes the many freelancers active within the sector. Manchester is estimated to account for 3,000 of those total FTEs and half the GVA or £115m.

Across the six music sub-sectors (included in the Music by Numbers taxonomy and analysis), the **music creators** sub-sector generated the largest employment impact: 1,260 FTEs in Manchester and 3,830 FTEs in Greater Manchester. The music creators sub-sector accounted for 42% of the overall employment impact generated by the music sector in Manchester, and 56% in Greater Manchester.

The music creator sub-sector also generated a relatively high level of GVA: £24m for Manchester and £73m for Greater Manchester. However, the largest GVA impact came from the **live music** sub-sector, which generated £51m for Manchester in 2019 and £85m in GVA for Greater Manchester.[30] When viewed in terms of the share of the UK total, Greater Manchester's live music sub-sector displayed the highest percentage, at 6.5%, which was significantly higher than its share of the UK's total population. Manchester's live music sub-sector accounted for 3.9% of the economic impact of the live music sector across the UK. By way of a benchmark for these percentages, we note that Greater Manchester accounted for 4.2% of the UK's total population in 2019 and 3.6% of the UK's £1.9bn in GVA in 2017 (the most recent year of published GVA statistics at a sub-regional level).

Table 1 presents estimates of the direct economic impact of the music sector in Manchester and Greater Manchester. In particular, Table 1 details Greater Manchester's estimated percentage share of UK employment and GVA in each music sub-sector.

Similarly, Table 1 indicates Manchester's share of the direct economic impact within Greater Manchester. These shares were arrived at by examining Manchester's share of Greater Manchester's total employment in SICs and SOCs relevant to the music sector, or its share of live music audiences.[31] These shares range from 33% for the music creators sub-sector to 60% for the recorded music, music publishing and music representatives sub-sectors, to 88% for the live music sub-sector. Again, by way of a benchmark, we note that Manchester accounted for approximately 20% of Greater Manchester's population and 30% of the employed workforce in 2019.

Table 1. Direct economic impact of music sector in Greater Manchester and Manchester, 2019

Sub-sector	UK-wide	Manchester City		Greater Manchester	
		Share of Greater Manchester total	Amount	Share of UK total	Amount

[30] The estimated employment and GVA impacts for Greater Manchester's live music sub-sector may understate its impact for 2019, since the percentage derived for the share of the UK total (6.5%) was based on live music data for 2017 – the year of the Manchester Arena terrorist attack.
[31] UK Music (2019) p.9.

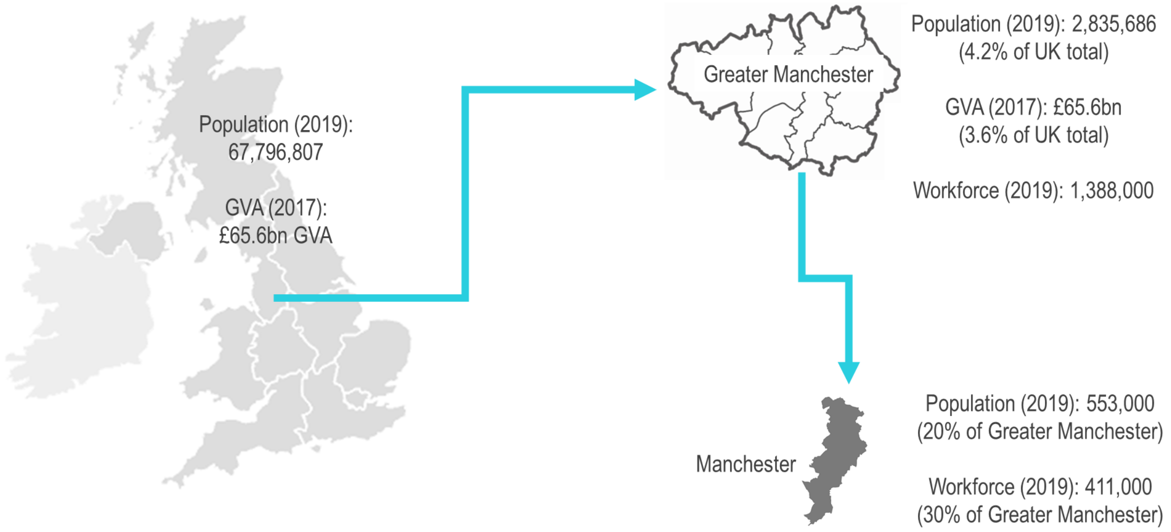
Music creators Artists Composers Producers Engineers	142,000 FTEs £2.7bn in GVA	33%	1,260 FTEs £24m GVA	2.7%[32]	3,830 FTEs £73m GVA
Live music Music festival organisers Music promoters Music agents Production services for live music Ticketing agents Venues	34,000 FTEs £1.3bn in GVA	88%	1,940 FTEs £74m GVA	6.5%	2,210 FTEs £85m GVA
Recorded music Record labels Recorded rights holders Digital music distributors Recording studios Physical distribution	5,400 FTEs £613m GVA	60%	140 FTEs £16m GVA	4.4%	240 FTEs £27m GVA
Music publishing Publishing companies Publishing rights holders	1,368 FTEs £524m GVA	60%	40 FTEs £14m GVA	4.4%	60 FTEs £23m GVA
Music representatives Collecting societies Music managers Trade bodies Accountants Lawyers	3,100 FTEs £170m GVA	60%	80 FTEs £5m GVA	4.4%	140 FTEs £8m GVA
Music retail Instruments shops Manufacture of instruments Digital music retail Physical retail	11,300 FTEs £463m GVA	40%	150 FTEs £6m GVA	3.2%	370 FTEs £15m GVA

[32] Based on Greater Manchester's 2.7% share of all workers in SOC 3415 Musicians.

Total	**197,168 FTEs £5.77bn GVA**	--	**3,610 FTEs £139m GVA**	--	**6,850 FTEs £230m GVA**

Source: Nordicity estimates based on data from UK Music, Music by Numbers 2020; UK Music, Greater Manchester Music Review 2019; ONS; and primary research

Figure 36. Greater Manchester and Manchester 's share of UK population and economy



Source: Nordicity calculations based on data from ONS and BRES

Total economic impact

The previous section presented estimates of the direct economic impact of the music sector in Manchester and Greater Manchester – that is, the employment and GVA generated directly within the various sub-sectors of the music sector. However, the impact of the music sector – or any industry or sector – goes beyond the boundaries of the sector itself. When businesses within a particular sector or industry purchase inputs from upstream suppliers they generate indirect economic impacts.

This sub-section provides estimates of the indirect and induced impacts of the Greater Manchester music sector which are retained within the economy as opposed to leaking outside the Greater Manchester economy. Estimates are also presented for the indirect and induced impacts retained within Manchester's economy.

When the indirect and induced impacts of Manchester's music sector are taken into account, we find that it contributed an estimated 5,450 FTEs of employment and £241m in GVA to Manchester's economy in 2019.

Table 2. Total local economic impact of music sector in Manchester, 2019

	Direct	Indirect	Induced	Total
Employment (FTEs)				
Music creators	1,260	120	80	1,460
Live music	1,940	1,000	190	3,130
Recorded music	140	160	30	330
Music publishing	40	140	30	210
Music representatives	80	20	10	110
Music retail	150	50	10	210
Total	**3,610**	**1,490**	**350**	**5,450**
GVA (£m)				
Music creators	24	7	2	33
Live music	51	56	10	140
Recorded music	16	9	2	27
Music publishing	14	8	2	24
Music representatives	5	1	1	7
Music retail	6	3	1	10
Total	**139**	**84**	**18**	**241**

Source: Nordicity estimates based on data from UK Music, Music by Numbers 2020; UK Music, Greater Manchester Music Review 2019; ONS; and primary research[33]

[33] 1. Figures are estimates of employment and GVA retained within the Greater Manchester economy.
2. All figures have been rounded to the nearest 10 FTEs.
3. Intermediate purchases from SIC 59 Motion picture, video and television programme production services, sound recording and music publishing; SIC 60 Programming and broadcasting services; SIC 90 Creative, arts and entertainment activities; and SIC 91

When the indirect and induced impacts of Greater Manchester's music sector are taken into account, we find that the music sector contributed an estimated total 9,590 FTEs of employment and £390m in GVA to the Greater Manchester economy in 2019.

Table 3. Total local economic impact of music sector in Greater Manchester, 2019

	Direct	Indirect	Induced	Total
Employment (FTEs)				
Music creators	3,830	380	140	4,350
Live music	2,210	1,110	280	3,600
Recorded music	240	260	80	580
Music publishing	60	230	60	350
Music representatives	140	30	10	180
Music retail	370	120	40	530
Total	**6,850**	**2,130**	**610**	**9,590**
GVA (£m)				
Music creators	73	22	8	103
Live music	85	64	16	165
Recorded music	27	16	4	47
Music publishing	23	14	4	41
Music representatives	8	2	1	11
Music retail	15	7	2	24
Total	**230**	**125**	**35**	**390**

Source: Nordicity estimates based on data from UK Music, Music by Numbers 2020; UK Music, Greater Manchester Music Review 2019; ONS; and primary research[34]

Library, archive, museum and other cultural services have been excluded from calculations of indirect and induced impacts in order to minimise double counting of impacts across the music sector value chain.

[34] 1. Figures are estimates of employment and GVA retained within the Greater Manchester economy.
2. All figures have been rounded to the nearest 10 FTEs.

Employment

In 2019, the national UK music economy employed an all-time high of 197 thousand FTE jobs according to UK Music[35]. Nordicity's analysis of the same year established the total employment within Greater Manchester's music economy to comprise 9.6 thousand FTE jobs. Nordicity's analysis points to a reduction in the number of full-time workers from 2019 to 2020 as a result of COVID-19, whilst estimates were not available due to shortages in data. The findings correspond with decreased revenues reported by a larger sample of respondents to the Nordicity Survey of Manchester's Music Economy 2021 along with findings in the Music by Numbers report by UK Music. Meanwhile, survey responses of music businesses suggest that, within the same period, the number of registered freelancers increased and there was no material change in the number of part-time workers. From these consultations, a degree of instability within the sector can be inferred, suggesting that fewer permanent roles were being supported or created.

Interestingly across the whole economy, the *Our Manchester Industrial Strategy 2019* revealed city-wide increases in insecure employment due to an increase in the wider gig economy.[36] The insecure employment working practices, which have been historic in the music sector, are becoming more common practice in other industries. Consideration towards these common challenges may help address wider issues around the development and retention of talent in Manchester. An implied risk is that increasingly, workers and creatives may leave the Manchester music economy to seek opportunities in other established music cities or to pursue work in other sectors in order to support their music interests.

Meanwhile, consultations with businesses and support bodies around Greater Manchester found that despite changing patterns in employment, the aggregated salaries for surveyed businesses in 2019 and 2020 remained consistent across all types of work. Whilst this does not negate the potential issues around long-term growth in the music industry in connection to reduced full-time employment numbers, it does suggest that the industry continues to generate revenue and not see any reduction in overall income generation.

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3. Intermediate purchases from SIC 59 Motion picture, video and television programme production services, sound recording and music publishing; SIC 60 Programming and broadcasting services; SIC 90 Creative, arts and entertainment activities; and SIC 91 Library, archive, museum and other cultural services have been excluded from calculations of indirect and induced impacts in order to minimise double counting of impacts across the music sector value chain.

[35] UK Music. 2021.

[36] Manchester City Council (2019a) "Developing a More Inclusive Economy. Our Manchester Industrial Strategy", p.9

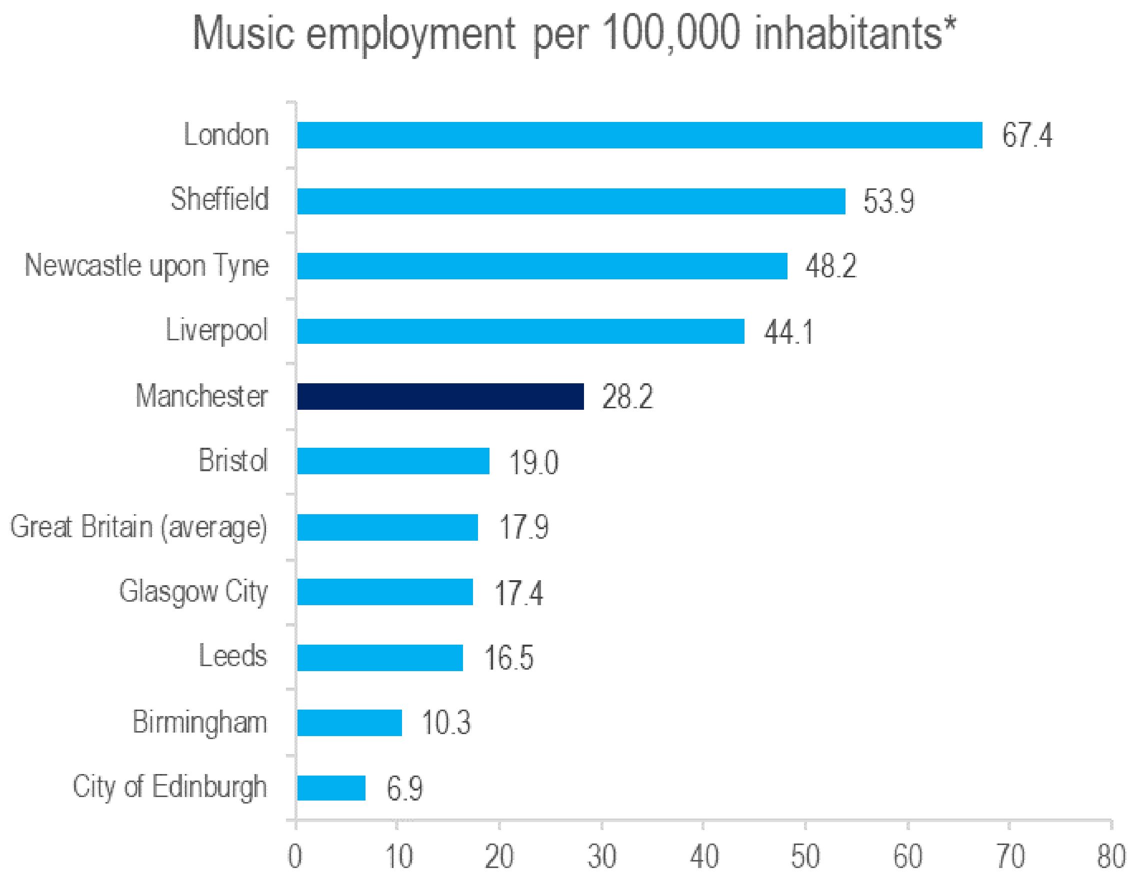
Manchester: A leading centre of music employment among large cities in the UK

Whilst comprehensive and comparable statistics on the relative size of the music sectors in different cities across the UK is not available, we have used employment statistics published by ONS of recorded music, music publishing and retail to derive an approximate indicator music sector size across seven cities in the UK.

These figures do not include 'live music', for which Manchester performs particularly strongly. This is due to limitations of the Standard Industrial Classifications (SICs) which are not suitable for all aspects of the music industry, live music in particular, which has major limitations.

This indicator combines published employment data for 2019 for SIC 5920 Sound recording and music publishing, SIC 3220 Manufacture of musical instruments, and SIC 46491 Wholesale of musical instruments, and compares it to the total population in each city.

Based on this particular indicator, Manchester displayed music employment of 28.2 workers per 100,000 inhabitants. This was lower than the music employment intensity displayed by London, Sheffield, Newcastle and Liverpool, but higher than five other large cities and the average across Great Britain (17.9) such as Bristol, City of Glasgow, Leeds, Birmingham and the City of Edinburgh.



Source: Nordicity calculations based on data from ONS-BRES
* Includes employment in SIC 5920 Sound recording and music publishing, SIC 3220 Manufacture of musical instruments, and SIC 46491 Wholesale of musical instruments

Music tourism

The estimates of the economic impact of the live music sub-sector reported above include the employment and GVA generated by music tourists' spending at music venues. That is, the spending at music venues by attendees from outside of Manchester or Greater Manchester. However, the estimates reported above do not include the indirect spending by these music tourists on accommodation, food and beverage, and other retail outside of music venues. The additional economic contribution of this indirect spending is analysed below.

In 2017, an estimated 703,000 music tourists (out of a total audience of 1.9 million) attended music events in Greater Manchester.[37] These music tourists spent an estimated £169 million during their visits to Greater Manchester of which £69 million represented indirect expenditures such as accommodation, food and beverage, and retail outside of music venues.[38] These indirect expenditures were equivalent to an average of £85 per tourist-visit.

Similar statistics on the number of music tourists in Greater Manchester are not available for 2019. However, to estimate the number of music tourists attending events in Greater Manchester in 2019, we applied Greater Manchester's share of the UK's total music tourists in 2017 (6.4%) to the reported statistics for total UK music tourists in 2019 (12,600,000).[39] This approach indicates that there were 800,000 music tourists estimated to have attended live music events in Greater Manchester in 2019. This represented just over half of the estimated 1.5 million in music tourists to all live music events in the North West in 2019.[40]

Assuming that these 800,000 music tourists also made average indirect expenditures of £85 per person per visit, the total indirect music tourism spending in Greater Manchester would have totalled £68.3 million in 2019. Nordicity's MyEIA™ Model was used to estimate the local economic impact of this music tourism spending. The modelling results (summarised in the table below) indicate that music tourism generated a total of 1,340 FTEs employment and £63m in GVA for the Greater Manchester economy in 2019. These impacts are in addition to the music sector impacts presented earlier in this report - such as the employment generated inside music venues themselves.

Table 4. Total local economic impact of music tourism in Greater Manchester, 2019

	Direct	Indirect	Induced	Total
Employment (FTEs)	830	340	170	**1,340**
GVA (£m)	36	21	6	**63**

Source: Nordicity estimates based on data from UK Music, Music by Numbers 2020; UK Music, Greater Manchester Music Review 2019; ONS; and primary research[41]

A similar approach was used to estimate the impact of music tourism in Manchester. Given that live events hosted in Manchester accounted for 88% of the total audience to live events

[37] UK Music (2019) p.8.
[38] Ibid.
[39] UK Music (2020a) p.24.
[40] UK Music (2020a) p. 26.
[41] 1. Estimates of economic impact of £85.3 million in spending within the Accommodation and Food Service sector.
2. Figures are estimates of employment and GVA retained within the Greater Manchester economy.
3. All figures have been rounded to the nearest 10 FTEs.

in Greater Manchester in 2019, we also assumed that Manchester accounted for 88% of music tourists. In other words, out of 800,000 music tourists visiting Greater Manchester in 2019, 704,000 were assumed to have visited live events in Manchester.

The average indirect expenditures of £85 per visitor imply that visitor spending totalled £59.8m in 2019. These music tourism expenditures generated a total of 1,090 FTEs employment and £53m in GVA for the Manchester economy in 2019. These impacts are in addition to the music sector impacts presented earlier in this report - such as the employment generated inside music venues themselves.

Table 5. Total local economic impact of music tourism in Manchester, 2019

	Direct	Indirect	Induced	Total
Employment (FTEs)	720	300	70	**1,090**
GVA (£m)	31	18	4	**53**

Source: Nordicity estimates based on data from UK Music, Music by Numbers 2020; UK Music, Greater Manchester Music Review 2019; ONS; and primary research[42]

Night-time economy

In the previous section, we examined how music tourists (i.e. live performance attendees visiting from outside Manchester or Greater Manchester) contributed to the local economy through their expenditures outside of music venues. Local audiences also contribute to the local economy through their own expenditures before and after live music performances. This is often referred to as the 'night-time economy' or night-time economy impact.

As noted above, in 2017, total attendance to live music events in Greater Manchester was 1.9 million, of which 703,000 were music tourists, and 1.2 million were local residents.[43]

Similar statistics on total live attendance in Greater Manchester are not available for 2019. However, to estimate the total attendance to live events in Greater Manchester in 2019, we applied Greater Manchester's share of the UK's total music attendance in 2017 (6.5%) to the reported statistics for total UK live music attendance in 2019 (33,700,000)[44] to arrive at an

[42] 1. Estimates of economic impact of £85.3 million in spending within the Accommodation and Food Service sector.
2. Figures are estimates of employment and GVA retained within the Greater Manchester economy.
3. All figures have been rounded to the nearest 10 FTEs.
[43] UK Music (2019) p.8.
[44] UK Music (2020a) p.24.

estimate of 2,200,000 total attendees to live music in Greater Manchester in 2019. We then deducted our previous estimate of music tourists (800,000) to arrive at an estimate of 1,400,000 local attendees to live music in Greater Manchester in 2019.

A study of grassroots music venues (GMVs) conducted by Nordicity (with the Music Venues Trust and Mayor of London) in 2016 found that live music attendees to GMVs spent an average of £12 on food and beverage outside of venues before and after live performances in 2016.[45] Taking account of consumer price inflation, this implies that average outside-venue spending was likely £12.81 in 2019. **Based on average spending of £12.81, we estimate that Greater Manchester's local music audiences contributed £17.9 million to Greater Manchester's night-time economy in 2019.**

Nordicity's MyEIA™ Model was used to estimate the local economic impact of this night-time economy spending. The modelling results (summarised in the table below) indicate that night-time spending by local audiences in Greater Manchester generated a total of 340 FTEs employment and £16m in GVA for the Greater Manchester economy in 2019.

Table 6. Total local economic impact of local audiences' night-time spending, Greater Manchester, 2019

	Direct	Indirect	Induced	Total
Employment (FTEs)	220	90	30	**340**
GVA (£m)	9	5	2	**16**

Source: Nordicity estimates based on data from UK Music, Music by Numbers 2020; UK Music, Greater Manchester Music Review 2019; ONS; Music Venues Trust; Mayor of London; and primary research[46]

Given that live events hosted in Manchester accounted for 88% of total audience to live events in Greater Manchester in 2019, we also assumed that Manchester accounted for 88% of local music audiences and their night-time spending. In other words, out of 1,400,000 local music attendees in Greater Manchester in 2019, 1,232,000 were assumed to have attended live events in Manchester. **These local audiences contributed an estimated £15.8m to Manchester's night-time economy in 2019.**

[45] Nordicity, Music Venues Trust and Mayor of London (2016)
[46] 1. Estimates of economic impact of £85.3 million in spending within the Accommodation and Food Service sector.
2. Figures are estimates of employment and GVA retained within the Greater Manchester economy.
3. All figures have been rounded to the nearest 10 FTEs.

This contribution to the night-time economy generated a total of 290 FTEs employment and £14m in GVA for the Manchester economy in 2019. These impacts are in addition to the music sector impacts presented earlier in this report - such as the employment generated inside music venues themselves.

Table 7. Total local economic impact of local audiences' night-time spending, Manchester, 2019

	Direct	Indirect	Induced	Total
Employment (FTEs)	190	80	20	**290**
GVA (£m)	8	5	1	**14**

Source: Nordicity estimates based on data from UK Music, Music by Numbers 2020; UK Music, Greater Manchester Music Review 2019; ONS; Music Venues Trust; Mayor of London; and primary research[47]

Summary of overall impact

Summing up the local economic impacts of the music sector (and its supply chain) with the additional impact associated with music tourism and the impact on the night-time economy, we conclude that the music ecosystem generated an estimated total of 11,270 FTEs of employment and £469m in GVA for the Greater Manchester economy in 2019.

Table 8. Summary of overall local economic impact of music ecosystem in Greater Manchester, 2019

	Direct	Indirect	Induced	Total
Employment (FTEs)				
Music sector	6,850	2,130	610	**9,590**
Music tourism	830	340	170	**1,340**
Night-time economy	220	90	30	**340**

[47] 1. Estimates of economic impact of £85.3 million in spending within the Accommodation and Food Service sector.
2. Figures are estimates of employment and GVA retained within the Greater Manchester economy.
3. All figures have been rounded to the nearest 10 FTEs.

Total	**7,900**	**2,560**	**810**	**11,270**
GVA (£m)				
Music sector	230	125	35	**390**
Music tourism	36	21	6	**63**
Night-time economy	9	5	2	**16**
Total	**275**	**151**	**43**	**469**

Source: Nordicity estimates based on data from UK Music, Music by Numbers 2020; UK Music, Greater Manchester Music Review 2019; ONS; Music Venues Trust; Mayor of London; and primary research[48]

Similarly, we conclude that the music ecosystem generated an estimated total of 6,830 FTEs of employment and £308m in GVA for the Manchester economy in 2019.

Table 9. Summary of overall local economic impact of music ecosystem in Manchester, 2019

	Direct	Indirect	Induced	Total
Employment (FTEs)				
Music sector	3,610	1,490	350	**5,450**
Music tourism	720	300	70	**1,090**
Night-time economy	190	80	20	**290**
Total	**4,520**	**1,870**	**440**	**6,830**
GVA (£m)				
Music sector	139	84	18	**241**
Music tourism	31	18	4	**53**
Night-time economy	8	5	1	**14**
Total	**178**	**107**	**23**	**308**

[48] 1. Figures are estimates of employment and GVA retained within the Greater Manchester economy.
2. All figures have been rounded to the nearest 10 FTEs.

Source: Nordicity estimates based on data from UK Music, Music by Numbers 2020; UK Music, Greater Manchester Music Review 2019; ONS; Music Venues Trust; Mayor of London; and primary research[49]

Overall impact in 2020

To estimate the direct and overall economic impact of the music ecosystem in Manchester and Greater Manchester in 2020, we applied the rates of economic decline implied by the year-over-year changes reported in This is Music 2021,[50] published by UK Music.

Whilst that report did not provide a detailed sub-sector by sub-sector analysis of UK-wide economic activity in 2020, it did provide enough data to derive approximate impact rates.

Table 10. Implied UK-wide percentage rates of growth/(decline) in 2020

	Employment	GVA
Music creators	(40%)	(40%)
Live music*	(35%)	(90%)
Other sub-sectors Recorded music Music publishing Music representatives Music retail	(7%)	(23%)

Source: UK Music, This is Music 2021

* Also applied to music tourism and night-time economy impacts

Based on these rates of employment and GVA decline in 2020, we estimate that direct employment in Greater Manchester's music ecosystem dropped by 2,720 FTEs to 5,180 FTEs. An estimated £162m in GVA was lost from Greater Manchester's music ecosystem in 2020. These declines in employment and GVA were concentrated in the music creators and live music subsectors, and the music tourism and night-time economy impacts associated with live music.

[49] 1. Figures are estimates of employment and GVA retained within the Greater economy.
2. All figures have been rounded to the nearest 10 FTEs.
[50] UK Music (2021)

Table 11. Summary of direct economic impact of music ecosystem in Greater Manchester, 2019 and 2020

	2019	2020	Change
Employment (FTEs)			
Music sector	6,850	4,500	**(2,350)**
Music tourism	830	540	**(290)**
Night-time economy	220	140	**(80)**
Total	**7,900**	**5,180**	**(2,720)**
GVA (£m)			
Music sector	230	108	**(122)**
Music tourism	36	4	**(32)**
Night-time economy	9	1	**(8)**
Total	**275**	**112**	**(162)**

Source: Nordicity estimates based on data from UK Music, This is Music 2021; UK Music, Music by Numbers 2020; UK Music, Greater Manchester Music Review 2019; ONS; Music Venues Trust; Mayor of London; and primary research[51]

For Manchester, we estimate that direct employment in the music ecosystem dropped by 1,510 FTEs to 3,020 FTEs. An estimated £121m in GVA was lost from Greater Manchester's music ecosystem in 2020. As with Greater Manchester (and across the UK), these declines in employment and GVA were concentrated in the music creators and live music subsectors, and the music tourism and night-time economy impacts associated with live music.

[51] 1. Figures are estimates of employment and GVA retained within the Greater Manchester economy.
2. All figures have been rounded to the nearest 10 FTEs.

Table 12. Summary of overall local economic impact of music ecosystem in Manchester, 2019 and 2020

	2019	2020	Change
Employment (FTEs)			
Music sector	3,610	2,420	**(1,190)**
Music tourism	720	470	**(250)**
Night-time economy	190	120	**(70)**
Total	**4,520**	**3,010**	**(1,510)**
GVA (£m)			
Music sector	139	53	**(86)**
Music tourism	31	3	**(28)**
Night-time economy	8	1	**(7)**
Total	**178**	**57**	**(121)**

Source: Nordicity estimates based on data from UK Music, This is Music 2021; UK Music, Music by Numbers 2020; UK Music, Greater Manchester Music Review 2019; ONS; Music Venues Trust; Mayor of London; and primary research[52]

Policy Review

Introduction

The following policy review of *Our Manchester Strategy* and *Our Manchester Industrial Strategy* has been developed to provide a foundation for the economic impact analysis. Whilst the below primarily focuses on these two reports, on 21st April 2021 colleagues from Manchester City Council, Marketing Manchester, Arts Council England, Greater Manchester Combined Authority, and CityCo briefed Sound Diplomacy and Nordicity on the key strategic

[52] 1. Figures are estimates of employment and GVA retained within the Manchester economy.
2. All figures have been rounded to the nearest 10 FTEs.

objectives for Manchester and Greater Manchester, and signposted the team to other reports for contextual purposes.

The below analysis looks at how these reports can support the strategic aims of Manchester whilst supporting the music industry, and identifies areas in which the music ecosystem should be taken into consideration.

Our Manchester Industrial Strategy 2019

Written in 2019, the ‘Developing a More Inclusive Economy, Our Manchester Industrial Strategy’ is an economic strategy that was developed through local engagement to ensure that everyone that makes up Manchester’s businesses and communities are taken into consideration in future planning. Music is highlighted as a cultural strength in the city as an intrinsic part of the culture and creative industries. There are a number of areas in which the sector should be taken into consideration, either to support the thriving industry in the city and county (music tourism alone generated £169million in Greater Manchester in 2017[53]), or where music can play a role in strengthening the city’s objectives.

An engagement exercise for the strategy with residents, businesses and organisations found that people are positive about opportunities and potential in Manchester, and take part in social and cultural activities.[54] At the same time, people want to see more specific initiatives for career pathways/staying in work, and businesses and organisations want and need access to a strong talent pool.

Strategic Pillar 1: People

Funded initiatives, music-related non-profit organisations, and conversations with stakeholders would be expected to reveal multiple projects and programmes being run within the music industry that have a **social value**, a core goal of the strategy. Music can play a role in social integration through work experience, educational programmes and community events, providing the city with a powerful tool to break down barriers for residents accessing employment whilst also generating cohesion and a sense of community. Music also has an important role to play in Manchester’s objectives around **volunteering**, as music organisations are often underfunded meaning volunteers for music activities could provide support for

[53] UK Music (2019) p.8
[54] Manchester City Council (2019a) p.11

these organisations, whilst at the same time increasing a sense of community and civic pride, and self-confidence and social inclusion which benefits the health and wellbeing of residents.

The strategic focus on increasing **skills development** will benefit the music sector as increased proficiency amongst musicians and workers will see sector growth and improve resources available to artists at all stages of their careers (e.g skilled managers for established artists). This will also provide Manchester with the ability to retain and attract talent as a hub for music and work to increase the already above national average numbers of skilled music industry workforce (as demonstrated in the survey data on page 29). The strategy further recognises the need for collaboration to deliver these economic and skill priorities.[55] Music sectors globally rely on collaborative processes to hone the craft and produce quality work, which in turn strengthens the sustainability of the industry. Connecting the music industry with universities and education services can develop a strong **talent pipeline**, leading to associations with the professional world during study. As the report mentions, graduate retention figures are already growing in the city[56] and the music ecosystem has the ability to support further growth and expansion in this area.

The strategy focuses on **STEM qualifications**, as they are in demand from local employers.[57] Music education should be recognised for the social and cognitive skills that it can provide and transfer to other disciplines. It has been proven that music education increases brain function through memory recall. This is relevant to STEM students as they are required to remember and implement equations and hypotheses.[58] Music education also provides students with increased emotional and social skills, all of which are transferable to and strengthen scientific and mathematical knowledge and understanding. The music sector will also benefit as an increase in music education will lead to a greater pool of local talent and develop future audiences through an increased awareness and knowledge of the sector. The development of music and STEM education working collectively could lead to Manchester becoming a hub for music tech in the UK.

Greater Manchester secured a landmark series of devolution deals including the integration of Health and Social care provision.[59] This could provide the opportunity to use music to support **mental and physical health** while strengthening the music ecosystem through job development. Cultural organisations Manchester Camerata and the Hallé Orchestra use the

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55 Manchester City Council (2019a) p.16
56 Manchester City Council (2019a) p.8
57 Ibid, p.15
58 K12 Dive (2017)
59 Manchester City Council (2019a) p.20

power of music to promote health and wellbeing, being able to grow and extend the reach and impact of those initiatives could support the Health and Social care work.

Cultural, creative and digital are highlighted in the report as some of the city's fastest growing sectors,[60] and local engagement work revealed culture, alongside media and sports are the most important sectors to **young people** when asked what their dream job would be.[61] During stakeholder workshops ahead of Sound Diplomacy and Nordicity's *Manchester Music Economy Research*, Manchester City Council colleagues highlighted music as a strategic area for growth, particularly in connection to how it can work to strengthen other sectors. Hotels, restaurants and retail employ some of the largest number of residents in Manchester, this is an area that has catastrophically suffered since COVID-19, but the city's recognition of the economic importance of music can work to mitigate problems by revitalising high streets and increasing tourism again. This could include music and retail partnerships, pop-ups in vacant and public spaces, live shows in non-music spaces outside of business hours (or vice versa), or music tourism packages at hotels.

Strategic Pillar 2: Place

The music industry has, on the one hand, been a pioneer in **digital development** and on the other, has had to adapt quickly since March 2020 to use existing and new digital platforms as new sources of revenue. As digital is high on Manchester's agenda, there are lessons that could be learnt from the music industry's experience, and communication and collaboration may reveal gaps in knowledge and support that the digital industry would benefit from. Digital platforms and existing contacts allow the music industry to connect globally to audiences, artists, businesses and investors. Therefore, the sector has the potential to play an important role in the local, national and international branding of Manchester as a marketing tool to attract visitors, talent and investment. Improving digital skills and development can also support the music sector in becoming more tech-focused, linking it to the suggestion in the previous section about Manchester becoming a hub for music tech. Amazon, Vodafone and EE already have headquarters in Manchester, but focus on music tech could expand this further to companies such as Spotify.

Additionally, music could be a marketing tool to attract those that pass through Manchester Airport (28 million yearly)[62] onto other parts of the country to the city centre. 703,000 music tourists attended events in Greater Manchester in 2017,[63] and there is the potential to increase this with music marketing campaigns, including event adverts at the airport, information about

[60] Ibid, p.6
[61] Ibid, p.36
[62] Manchester City Council (2019a) p.8
[63] UK Music (2019)

music tours, artists performing in airports and transport hubs, and promotions through hotels and tourism information centres. The strategy aims to build on the city's existing **international** strengths connected to sport and creative industries-related activities and events, which can be boosted through music tourism marketing connected to the arena, Manchester's music heritage and world-famous venues. Culture is already on the agenda for the regeneration and creation of thriving centres in Manchester.[64] Improved branding of Manchester's music heritage for tourism will create more audiences, and increase promotion of the overall music ecosystem from grassroots to the arena. An assessment of where music tourists to Manchester come from would help the development of direct marketing campaigns and to reach out to new markets.

Environmental sustainability is an area that many music businesses and organisations are already working on. The City is working with local festival organisers, event producers and venues with a sustainable events guide[65] through GMAST, the city's cultural lead for collaborative working on climate change and joint action on carbon reduction.[66] GMAST works closely with the city, the Manchester Climate Change Agency and national experts at Julie's Bicycle. The City is working with the music sector in Manchester to coordinate efforts towards the city's goal to become a zero carbon city by 2038 by introducing climate action into its Culture Grant Agreements.[67] Furthermore, in 2021 the research organisation the Tyndall Centre published a comprehensive report on music touring and the environment.[68]

The strategy aims to improve transport **infrastructure** through more environmentally friendly options (electric infrastructure) and to safely link different parts of the city to benefit young people and workers which will also prevent audience and talent drain to other cities.[69] Improvements to transport infrastructure both during the day and at night would facilitate more music-related activity, enabling audiences to use public transport, and therefore more affordable and environmentally sustainable options to travel to and from gigs and events. This would contribute to opening up centres, making them more vibrant and safer at night.

Strategic Pillar 3: Prosperity

Music makes a city more vibrant, it increases the quality of life for residents and therefore can be instrumental in making young people want to stay, whilst also attracting talent and investment. Furthermore, as Manchester already has a thriving music industry, developing

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[64] Manchester City Council (2019a) p.23
[65] Manchester City Council (n.d)
[66] GMAST (2021)
[67] Manchester City Council (2020)
[68] Tyndall Centre (2021)
[69] Manchester City Council (2019a) p.26

more careers in this sector would not only strengthen the music ecosystem but also the overall creative industries, thus attracting more creative talent which in turn drives innovation.

The plan to **repurpose vacant spaces** for more affordable, flexible workspaces[70] would not only support the music industry, but also develop a creative economy for the city. Creatives attract creatives, and as music businesses rely on each other and other creative realms (music tech, videographers, publishers, etc) having those companies in one space, as seen in the Sharp Project and Space Studios, will naturally create connections and business relationships between companies in the same space and also attract others. Making spaces affordable in local areas across Manchester will support local music entrepreneurs and startups, working towards the 'Prosperity' pillar and driving more inclusive economic activity.

The strategy reveals that Manchester has seen an increase in **insecure employment** due to an increase in workers in the gig economy.[71] Understanding the economic impact of music on the city, such as through the Sound Diplomacy and Nordicity report, will be crucial to showing its value and protecting it from low wages, expectations to play for free, and limited employment opportunities. The music sector should be taken into consideration when developing programmes and strategies connected to the gig economy and self-employed workers, as 72% of music sector workers in the UK are self-employed.[72] Focus on the music and cultural industries via the goals of the strategy to create a fair economy, increase employment opportunities and increase the number of residents accessing higher wage brackets will strengthen the sector and make it a sustainable career choice for residents. This can be done through fair play schemes for musicians or business rates discounts for grassroots venues. A Cultural Sector Skills Plan would also be an effective way to assess existing opportunities and ensure that the cultural sector is built into planning frameworks and strategies, making the city accountable for working with the sector.

Our Manchester Industrial Strategy highlights the role that culture and the NTE play in attracting **businesses, investment and residential growth**.[73] As live music is a major aspect of culture and NTEs in cities worldwide - including Manchester - it is a sector that should continue to be taken into consideration when exploring ways to move forward with implementation and in future strategies. Manchester City Council deploys cultural investment to support its regeneration priorities, examples of this include:

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[70] Ibid, p.42
[71] Ibid, p.9
[72] UK Music (2020b)
[73] Manchester City Council (2019a) p.8

- The construction of The Bridgewater Hall, creating a major expansion of the Civic Quarter and complementing the development of the former Manchester Central railway station into an international conference venue
- The construction of the purpose-built arts centre, HOME[74] in 2015. It programmes theatre, cinema and music as well as other artforms and events
- The soon-to-be opened venue, The Factory, a new £186m cultural venue on the site of the former Granada TV studios - which is now branded the district of 'St Johns'. The Factory helped to attract wider investment into business space, with a focus on the creative & digital industry and residential developments.

Each investment has led to new commercial developments in the city by businesses and have supported residential growth. Live music and music businesses should continue to be part of this work. Culture has been central to placemaking priorities in the city, seeing the development of cultural facilities as an essential ingredient to creating a successful and vibrant city. One where residents want to live, businesses want to invest and visitors want to go to.

The city is classed as 'entrepreneurial', which is also what the majority of the music industry is, as each artist can and should be considered as a startup. Therefore the music industry should be targeted with promotional campaigns to ensure that businesses are aware of their eligibility for any and all business support opportunities.

Our Manchester Strategy Forward to 2025

The latest strategy for the City of Manchester, *Our Manchester Strategy Forward to 2025*[75] was published in 2021 as a reevaluation and amendment of the priorities set out in the 2016 report *Our Manchester, The Manchester Strategy.*[76] This is an important document as it takes into account the impact of COVID-19 on the city and how the pandemic has and will affect planning for the future.

Whilst there are no direct references to music, from conversations with Council colleagues and stakeholders, music is high on the agenda, particularly in connection with recovery and tourism. Music is also considered to be key in supporting the night time economy, hospitality sector and other significant growth sectors such as media and digital, which are developing at a rapid rate in the city, and additionally as having a fundamental role in the **placemaking** agenda for new and emerging development areas. Therefore, there are a number of ways in

[74] HOME (n.d)
[75] Manchester City Council (2021)
[76] Ibid

which the sector can strengthen Manchester's objectives and in return, the city can support the sector. Since the publication of the original strategy, *Our Manchester, The Manchester Strategy,* jobs increased in the city from 357,000 to 410,000 between 2015 and 2019. The cultural, creative and digital sectors played a significant role in this increase,[77] of which music would have been part of.

As the report states, COVID-19 has created some positives, such as an increase in cleaner air due to fewer people commuting on a daily basis.[78] Ways in which the music industry can further support this change and help continue the positive **environmental impact** is if the ecosystem is decentralised, as opportunities in city centres and outside are important for continued and sustainable growth. Whilst Manchester City Centre has seen a buoyant return of users, urban behaviours are still likely to continue to seek more hyperlocal activities (those in their residential area) as home working continues, desire to travel decreases and endorsement of local businesses continues. Targeted campaigns towards music businesses, particularly those that have a history of community engagement, to attract them to regional areas will lead to more events, activities and opportunities being accessible to residents locally. This is already happening in Wigan, as hyperlocal culture has become a central part of their new cultural manifesto, The Fire Within.[79] Passionate people are the key drivers behind the music economy, it is upon their creativity, innovation and enterprising spirit that the live music sector is based. Focus across the sub-region will increase the cultural richness of neighbourhoods and communities, and provide them with greater access to investment, growth and opportunities all across Greater Manchester with music as the core offer. This can be done whilst continuing to support cultural recovery in the Manchester City Centre.

Part of the strategy focuses on making Manchester an **equitable and progressive** city that supports residents to thrive at any stage of life, irrespective of their socioeconomic situation.[80] In particular, having a globally competitive and diverse workforce and the ageing population and long lasting employment are of concern. This was also highlighted in the *Our Manchester Industrial Strategy*[81] as it found that older residents have trouble with finding and remaining in employment. Music has the potential to drive change in this area. Greater Manchester's Festival of Ageing proved that there was demand and support for this area of the population, it also led to continued work with the council and the partnership with the Centre for Ageing Better.[82] In this sphere, music has a unique position at being a facilitator in social inclusion, such as through choirs, orchestras and community events, which is important as the

[77] Ibid, p.9
[78] Ibid, p.11
[79] Wigan Council (2022) "The Fire Within". Online at https://www.thefirewithin.org.uk/TheFireWithin-Cultural-Manifesto.pdf accessed 14-02-2022
[80] Manchester City Council (2021) p.17
[81] Manchester City Council (2019a) p.11
[82] Manchester City Council (2019b) p.128

population ages, loneliness in older adults can increase. Music can be the driver to continue employment opportunities as it can provide the chance to create, produce and promote events and businesses connected to the older population. This feeds into Manchester's objective to have an equitable and progressive future.

The music sector will need to be taken into consideration when tackling the challenges identified in the strategy. This includes **Brexit**,[83] as it will cause considerable problems for the live music sector particularly when navigating the costs and logistics of booking international talent, and promoting local talent to international bookers and agents. Support required may include funding to cover extra costs, advice and guidance surrounding new regulations (e.g touring visas), and hosting demonstrator international events and festivals that welcome international touring, business and tourism. In doing so, Manchester will support talent retention, create sustainable careers in the local music industry and increase confidence and knowledge amongst workers in the music ecosystem.

Another area for consideration is creating a **fair economy**, which was also touched upon in reference to the *Our Manchester Industrial Strategy*. This would include ensuring that artists and performers are sufficiently remunerated for gigs/concerts organised by the City of Manchester and other public entities, those interested in a career in music have an understanding of the roles that exist within the industry and have the opportunity to connect with music businesses, and that existing members of the music ecosystem have access to ongoing training and information that can support development and work towards sustainable, long lasting careers.

The city has found that more music events, workshops and taster sessions, and more activities for young people are desired by residents in the city. By tying these together it provides an opportunity for social interaction but also could play a pivotal role in career interest and development in connection to music, while creating the audiences of the future.[84] This would feed into the city's objectives to create a thriving and sustainable city, and to be a highly skilled city.[85]

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[83] Manchester City Council (2021) p.10
[84] Manchester City Council (2019b) p.162
[85] Manchester City Council (2021) pgs 17-18

Conclusion

Manchester's music ecosystem is a vital component of the local, regional and national economy, and the music and scenes are culturally significant and infamous across the world, making it an ideal place to create and experience music. It contributes 11,270 FTEs of employment and £469m in GVA to Manchester's economy, comprising a total economic impact of £390 million in GVA and 9,590 FTE jobs from the **music sector**, £63 million in GVA and 1,340 FTE jobs from **music tourism** and £16 million in GVA and 340 FTE jobs from the **night-time economy**. It's this dynamic and resilient ecosystem that supports a distinct form of economic and social development and inclusive growth. As a major global centre for music production and consumption, the opportunities to build on these strengths present tremendous potential for both Greater Manchester and the UK as a whole.

The research and data discovered for this report reveals that Manchester has a strong live music sector that generated £51m for Manchester in 2019, and is second to only London as a major national music economy, making it a major hub both regionally and nationally. Manchester's standing is competitive against other UK cities, matching the number of recording studios in Liverpool, and far surpassing those in Belfast and Cardiff, with similar comparisons seen in other areas of Manchester's music ecosystem. The findings in the economic impact analysis show that music creators account for 42% of the overall employment impact generated by the music sector in Manchester, and generated £24m for the city in 2019. This sub-sector will need continued support to ensure revenue growth continues during the period of recovery and beyond.

Manchester is a critical driver for the UK-wide music industry, owing to its characteristically strong position as a talent pipeline and business pipeline support. The live music sub-sector alone accounted for 3.9% of the economic impact of music across the UK in 2019. It is a fertile ground for new and emerging creatives and businesses both locally and from across the country.

To ensure continued growth and development in the City of Manchester, the following actions can be undertaken as immediate next steps. These will help galvanise Manchester in the next phase of work to underpin the council's economic development strategy with music at the centre.

Next Steps and Actions:

The findings in this report provide Manchester City Council with the evidence that the city has a diverse and vibrant music ecosystem that has been an important economic driver locally and regionally and has the potential to be so again as the sector recovers from the impact of COVID-19, and with the right support from the Council. The following list is a proposal for the next steps for Manchester City Council in their ongoing work to understand the scale and value of the music ecosystem in the city.

1. **Continue to engage with industry stakeholders and connected industries**

Organise industry roundtables and interviews with all areas of the music ecosystem (music creators, managers, businesses, event organisers, emerging talent, music educators, agencies, etc) to understand how they fit into the wider economy, where they require further support and how the Manchester Music City Steering Group can continue communication with them. Particular focus should be on conversations around business support (funding, use of government-led services, licensing and planning) and music education

2. **Sub-regional mapping and ongoing reviews of the City of Manchester's assets**

Consider mapping the entire Greater Manchester sub-region and undertake yearly mapping of the City of Manchester that industry stakeholders can feed into whilst developing a greater understanding of who is behind these assets and what they are doing. This can be done using a simple form embedded into the Manchester City Council website where the music community are able to submit their address and use that data to add to the living map.

3. **Continued monitoring monitoring and evaluation with a deepdive into the sector**

Further and ongoing monitoring and evaluation of the music ecosystem will play a major role in strengthening Manchester City Council's strategic objectives whilst feeding into and developing the industry. This should also include assessments of where tourists are travelling from to build music marketing campaigns.

4. **Support sector development in recorded music**

Investment to support the recorded music sector, leveraging Manchester's strengths in live music, will help diversify the city's music economy, enhancing its offering with the full infrastructure of a global music city ecosystem locally. A fully rounded localised sector value chain would help retain and attract talent and business locally and regionally, mitigating the gravitational pull of London, and positioning Manchester more squarely on the global scale.

5. **Support international sector development in international collaboration, touring, export sales and revenue sources**

As a major music city, Manchester has the opportunity to position itself as a key sector globally. As much of the sector's activities and revenues are largely domestic or local, its growth and sustainability would benefit from increased international activities and investment in music creation, performance and distribution. Manchester's strength in live music could be further harnessed for more international touring and collaborations, and a growing recorded sector could reach markets in all corners of the world and benefit from scaling.

6. **Harness existing networks for music ecosystem partnership building**

Utilise Manchester Music City Steering Group to bridge the gap between businesses and music education providers, exploring opportunities for internships and work experience

7. **Create investment packages to attract music tech businesses to Manchester**

Develop a marketing package for investors connected to music technology, highlighting the reasons that existing tech companies in Manchester chose the city for their offices, and offer relocation support for businesses

8. **Undertake yearly updates to the economic impact of Manchester's music industry**

Using the framework explained in the economic impact section, update the economic impact estimates for Manchester on an annual basis

9. **Support music and retail partnerships**

Provide temporary events and retail licenses, create the opportunity for conversations between sectors led by Manchester Music City Steering Group, supporting access to vacant high-street and other premises and outdoor spaces for free or discounted to event organisers to host music events in non-music spaces.

Acknowledgements

Sound Diplomacy and Nordicity would like to thank every individual who worked with us, took an interest in this study, responded to the survey, attended a roundtable and shared

information. Your participation and input has been invaluable and the work could not have been completed without it.

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Appendix 1

Table Linking EIA and Asset Mapping Taxonomies

Economic Impact Taxonomy Level 1	Economic Impact Taxonomy Level 2	Asset Mapping Taxonomy
Music creators	Artists Composers Producers Engineers	*Note, 'Artist' and 'Composer' music creators were not included in the asset mapping. Orchestras & Choirs • Choirs (24) • Orchestras (6)
Live music	Music festival organisers Music promoters Music agents Production services for live music Ticketing agents Venues	Venues • Bars, Pubs, Cafes and Restaurants with Music (275) • Night Clubs (75) • Occasional Venues (47) • Dedicated Live Music Venues (40) • Multi-Purpose venues (25) • Arenas (5) Music Festivals • Music Festivals (29) Recording & Rehearsal Studios • Rehearsal Spaces (13) Music Businesses • Booking Agents & Promoters (10) [included in 'Music Businesses' in the Mapping taxonomy.] • Concert Producers (3) [included in 'Music Businesses' in the Mapping taxonomy.]

Music Tourism*	*Captured within 'Live music' above	n/a
Recorded music	Record labels Recorded rights holders Digital music distributors Recording studios Physical distribution	Recording & Rehearsal Studios ● Recording Studios (77) ● Record Labels (15) [included in 'Music Businesses' in the Mapping taxonomy.] ● Music Production Companies (3)
Music publishers	Publishing companies Publishing rights holders	
Music representatives	Collecting societies Music managers Trade bodies Accountants Lawyers	Support Bodies ● Music Education Hubs (17) ● Music Nonprofit Organisations (13) ● Regional Music Agencies (5) Music Businesses ● Music Managers (5) [included in 'Music Businesses' in the Mapping taxonomy.] ● Music PR (5) [included in 'Music Businesses' in the Mapping taxonomy.]
Music retail	Instruments shops Manufacture of instruments Digital music retail Physical retail	Record & Equipment Stores ● Record Stores (18) ● Instrument and Equipment Stores (16) ● Instrument manufacturers (3)

Wider music economy	Radio Music video production Manufacture of audio equipment/software Music photography Music press Manufacture, distribution, sale of music merchandise Music education	Radio ● Radio Stations (26) [included in the 'Music Businesses' in the Mapping taxonomy] Music Education ● Music Schools (18) ● Universities / Colleges with music business (4) ● Conservatories / Universities with Music (4)

Categorisation of Mapped Music Assets

Mapping Category / Tab	Subcategory name	Additional clarification / definition
Venues	Bars, Pubs, Cafes and Restaurants with Music	Locations where the main business is selling food and/or beverages to patrons and also present live music (i.e. may not have a permanent stage, opens also if there are no concerts)
	Dedicated Live Music Venues	Locations built with the purpose of presenting live music (i.e. has permanent stage and equipment, opens only for concerts)
	Night Clubs	Nightlife establishments with regular DJ nights and occasional live music performances
	Occasional Venues	Every other space that hosts music at least a couple of times a year (e.g. churches, community centres, casinos) / Public spaces and locations that occasionally host concerts, but are usually occupied for non-cultural

		purposes (e.g. sports fields, school auditoriums, parks)
	Multi-Purpose Venues	Locations where live music presentations are part of a larger cultural & events programme (e.g. theatres, art centres); art venues with music (galleries, museums)
	Arenas	Large capacity (usually over 2,000) hosting sports and music
	Closed Venues *(venues that have been closed in the last five years)*	Music venues only.
Music Education	Music Schools	Private music schools (all ages) or organisations.
	Conservatories / Universities with Music Programmes	All tertiary education institutions offering music (production or performance) programmes.
	Universities / Colleges with Music Business Programmes	All tertiary education institutions offering music business programmes
Recording Studios	Recording Studios	Registered music and audio studios offering music recording and mastering services
	Voiceover Studios	
	Music Production Companies	Music and audio production businesses, including home studios.
	Music Post-production	
Rehearsal Spaces	Rehearsal Spaces	Commercial or free to use space for music rehearsals.
Record & Equipment Stores	Record Stores	Retail establishments selling music physical music and/or merchandise
	Music instrument and equipment stores	Music instrument and equipment stores, including rentals
	Instrument manufacturers	
Music Radio Stations	Radio Stations	Music radio stations only
Music Business	Record Labels	Music labels with physical presence in the city
	Booking Agents & Promoters	Music event promoters and booking agents
	Music PR	
	Concert Producers	Audiovisual production of music events

	Music Managers	
	Other Music Businesses (Publishing, Law, etc.)	
Music Festivals	Music Festivals	Free or ticketed festivals and concert series
Orchestras & Choirs	Orchestras	Professional and amateur, incl. school and church
	Choirs	Professional and amateur, incl. school and church
Support Bodies and Not-for-Profits	NPOs	Music Nonprofit Organisations (Associations, foundations)
	Music Education Providers	Connected to Music Education Hubs
	Regional Music Agencies	