

The contribution of music festivals
& major concerts to Tourism in the UK

DESTINATION: MUSIC

FOREWORD BY FEARGAL SHARKEY



“Creativity is our nation’s calling card.”

“Is there anything else, other than music that has the power to transform the utterly mundane, like a pedestrian crossing in north London, into an international tourist hotspot?”

This simple question - raised at one of our staff meetings - was the starting point for this research, along with a growing recognition that we still don’t know the “real” value of music to this country. Thanks to the sterling work of economists at PRS for Music, we now have a greater understanding of the combined value of the music industry’s essential components (that is: publishing, recorded and live).

However, other areas are less well understood.

Given consistent growth of our festival season and concert circuit – not to mention the UK’s considerable heritage

– music tourism appeared an obvious area to explore.

Moreover, in its Plan For Growth, Government has specifically recognised the UK’s creative industries and tourism as two key economic sectors with growth potential.

A National Brand Index survey, included in Government’s Tourism Strategy and based on interviews with 20,000 individuals worldwide, ranked the UK fourth in the world for being an “interesting and exciting place for contemporary culture such as music, films, art and literature”.

This is how the rest of the world perceives us. Creativity is our nation’s calling card.

The results of this research should be viewed as a starting point. We have used the most conservative metrics and definitions.

However, the role of music in terms of creating jobs, in terms of sustaining businesses and in terms of attracting visitors to all regions of this country comes over loud and clear.

And there is still massive potential. While overseas visitors account for 5% of music tourists in terms of numbers, they account for a whopping 18% of spending.

The primary role of the music industry is to invest in this country’s talent and provide a base for it to succeed.

But, equally, we will do all we can to work with policy-makers and tourism bodies to realise the potential of this considerable economic asset.

Feargal Sharkey
CEO, UK Music

PREFACE BY MICHAEL EAVIS



**“I am proud that Glastonbury
contributes over £100 million
annually to the economy”**

When the first Glastonbury Festival took place in 1970 there were just 1500 people; we charged £1 entry which included all the milk you could drink from our own cows, Marc Bolan headlined as “T Rex” and the sun shone continuously. Now 40 years later the numbers have somewhat increased to around 180,000 people. The musicians too, all want to play here now - we had Stevie Wonder and Muse to headline the 40 year anniversary event. This year we have U2, Coldplay and Beyonce. Through the years we’ve had Paul McCartney, David Bowie, Radiohead, Oasis, Blur and The Smiths (back in 1984) to name just a few of our highlights.

I am proud that Glastonbury contributes over £100 million annually to the economy, and a substantial proportion of that, £52 million, is spent in Somerset and the South West.

With my daughter Emily I now hope that the Festival continues to be a highlight for music fans, for new music and for performers from Britain and around the world for many years to come. Next year is our fallow year to give the Farm and the village a breather, but we’ll be back in 2013 as strong and as lively as ever!

Michael Eavis
Founder, Glastonbury Festival

UK MUSIC is proud to present the most comprehensive study ever undertaken on the power of music as a tourist draw, and to give this a value in economic terms.

Never before has there been such a dedicated analysis of the contribution of music festivals and major concerts to the tourism economy.

UK Music was privileged to have unique access to the data of more than 2.5 million ticket purchases to concerts and music festivals that took place in every part of the UK in 2009 from a variety of national ticketing agencies.

We asked Bournemouth University's International Centre for Tourism and Hospitality Research to aggregate this data and carry out an analysis on our

behalf. The analysis focused on live music events with capacities of 5,000 or greater.

The analysis set out to determine how many people come to Britain from overseas for the primary purpose of attending a music festival or concert. We define an overseas music tourist as someone who booked a ticket to a live music event in the UK from their own country, prior to travelling as a means of differentiating them from those overseas visitors who happen to attend a music event once in the UK.

This ticketing data was then cross-referenced with individual festival surveys, tourism reports, economic impact assessments and music industry revenue data already published, to estimate the economic activity generated as a result of each type of visit. The calculation totalled estimations of both on and off-site spending for the duration of the visit.

In addition, the study sought to trace the even greater number of UK residents who travel cross-country to attend a music festival or concert. We define a domestic music tourist as someone who booked a ticket to a live music event in advance, and who travelled outside their home region to attend the event (or outside their home nation in the case of Scotland, Wales and N. Ireland).

The nine English regions: London, South East, South West, East, East Midlands, West Midlands, North East, North West, Yorkshire and the nations of N.Ireland, Wales, Scotland.

AND HERE ARE THE RESULTS*:

The major concerts and music festivals that take place in every corner of the UK attract more than **7.7 million** visits from those whom we define as a music tourist, overseas and domestic combined.

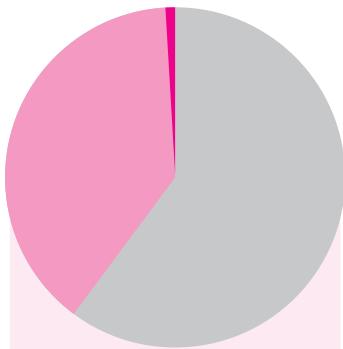
They spend **£1.4 billion** in total during the course of their trip.

This great music migration is boosting the UK's economy to the tune of at least **£864 million** and sustaining the equivalent of at least **19,700 full time jobs.**

*This data relates to 2009

Music Tourists

We calculate that, on average, music tourists make up 41% of the audience at large concerts and 48% of people at music festivals.



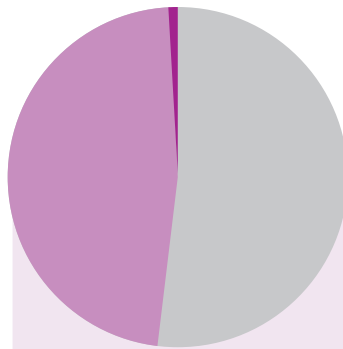
Concert Attendances
14.8 Million

Domestic Out of Region Tourists
5.8 Million

Overseas Tourists
294 Thousand

41%

Proportion of Attendances (Domestic & Overseas)



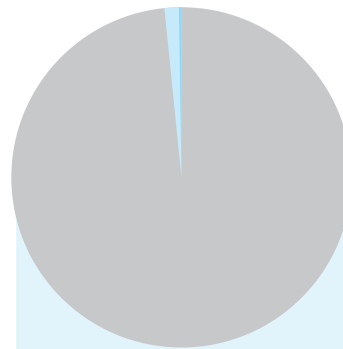
Festival Attendances
3.4 Million

Domestic Out of Region Tourists
1.6 Million

Overseas Tourists
59 Thousand

48%

Proportion of Attendances (Domestic & Overseas)



Music Attractions Attendances*
400 Thousand

Domestic Out of Region Tourists
20 Thousand

Overseas Tourists
4 Thousand

6%

Proportion of Attendances (Domestic & Overseas)

Totals

All Attendances
18.6 Million

Domestic Out of Region Tourists
7.4 Million

Overseas Tourists
357 Thousand

42%

Proportion of Music Tourists at All Events

* The inclusion of music attraction attendances in this report is illustrative rather than representative

Rebecca Mead

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Western Australia
Currently living in London

"I am from Perth, Australia and went to pretty much every music festival over the summer. Most of my money goes on music festivals, other live gigs and travelling. I have already bought my ticket for The Great Escape Festival in Brighton in May of this year."

"MOST OF MY MONEY GOES ON MUSIC FESTIVALS."

Russell Core

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Devon

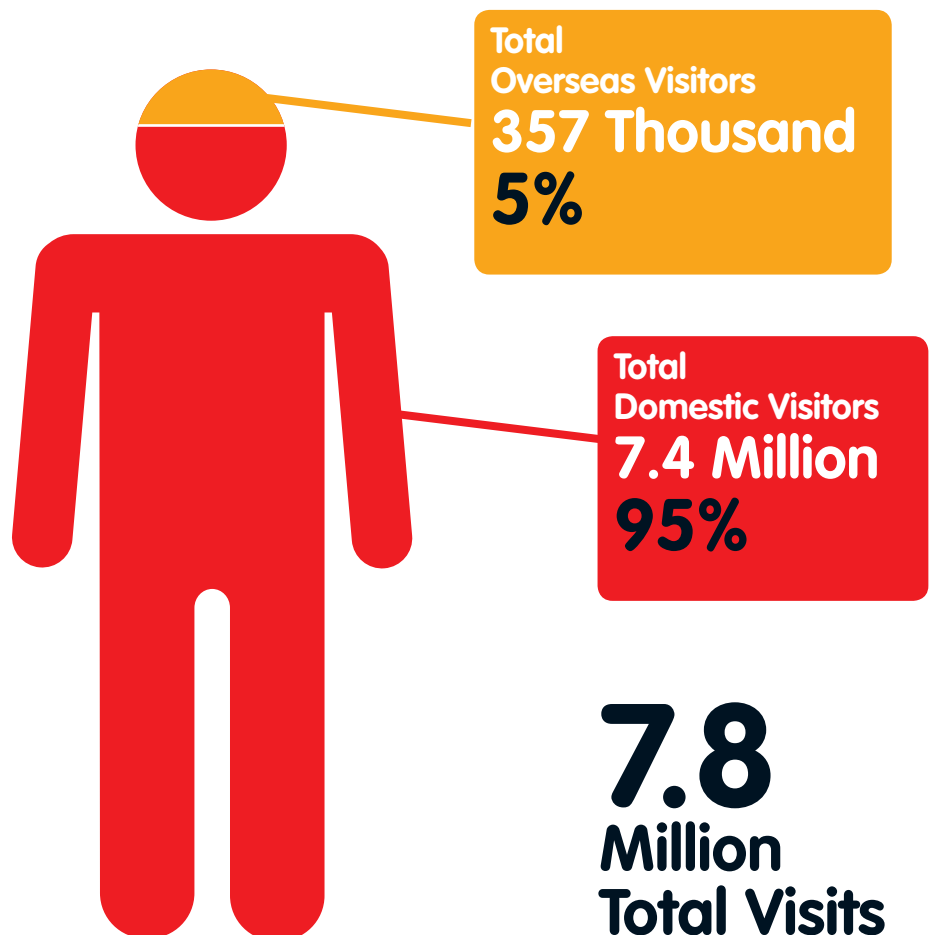
"I don't go on holiday because I can't afford it but I try to save all my money to go to Download Festival every year. I met my current girlfriend there two years ago. It's an amazing festival and about a million times more interesting than a week in Spain."

**"A
MILLION
TIMES
MORE
INTERESTING
THAN A
WEEK
IN SPAIN."**

Domestic vs Overseas Music Tourists:

The great majority of music tourists are UK residents, travelling outside of their region in order to see their favourite artists perform live in another region or nation of the UK.

Domestic tourism accounts for **95%** of all music tourism visits.



Spending by Music Tourists by Origin of Tourist



Overseas **Music Tourists** spend **£247 million** in the UK.

Whilst they make up a smaller share of the total music tourism market, they have significant importance as export earnings.

Overseas music tourists account for **5%** of music tourism visits, but **18%** of music tourism spending.

Photo: Rodrigo Ferrari

**"I'M PLANNING
ON MAKING
THE JOURNEY AGAIN."**

Overseas Tourism Spending:

**All Overseas
Tourists**

**Spend/Night
£72**

Source:
International
Passenger Survey (2009)

**Overseas Tourists
whose main
motivation for
travelling is music**

**Spend/Night
£99**

Source:
Our Calculations

Rodrigo Ferrari

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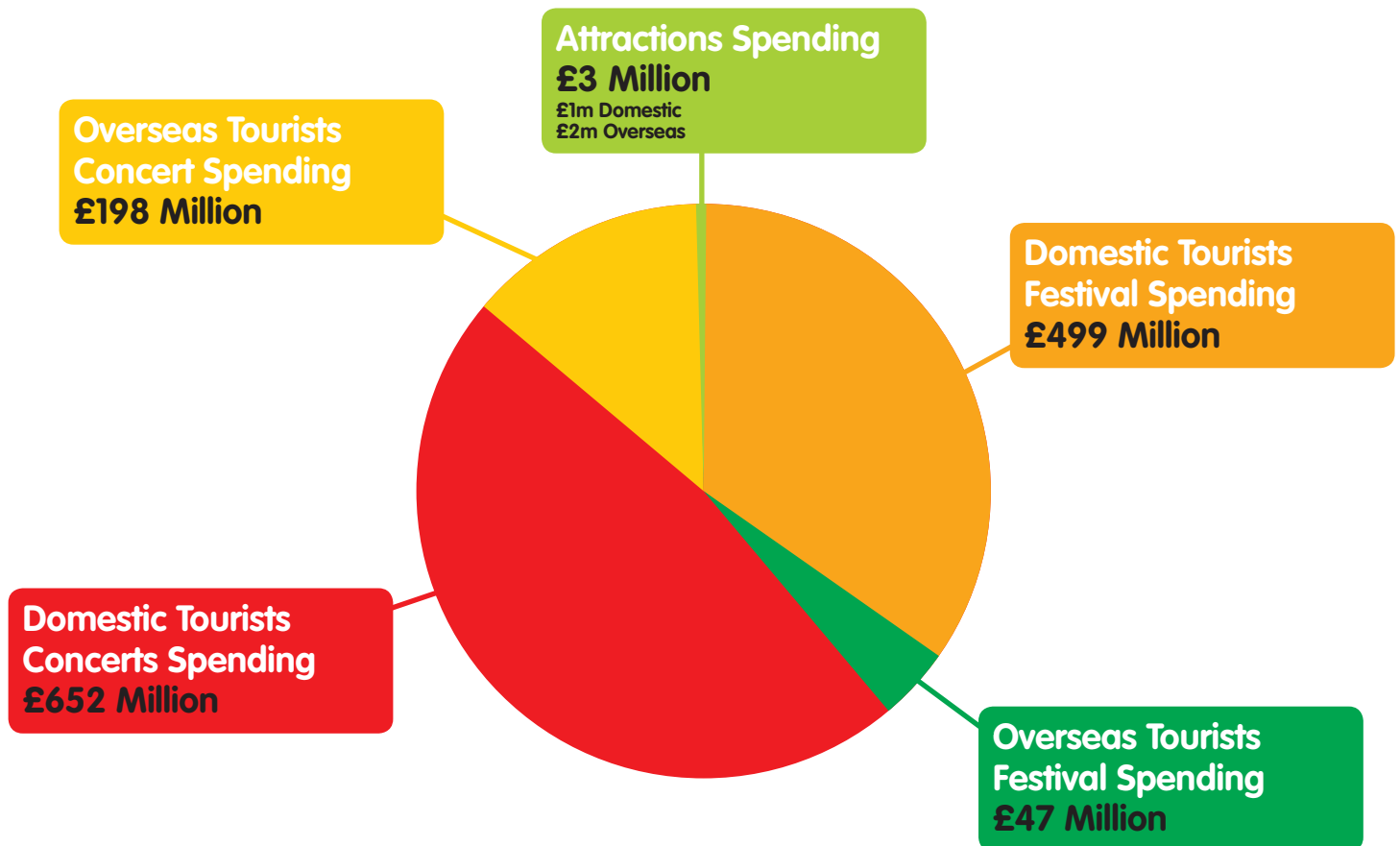
Chile

"I have travelled from Chile to the UK to attend the 2008 and 2010 Glastonbury Festivals. I'm planning on making the journey again in 2013."

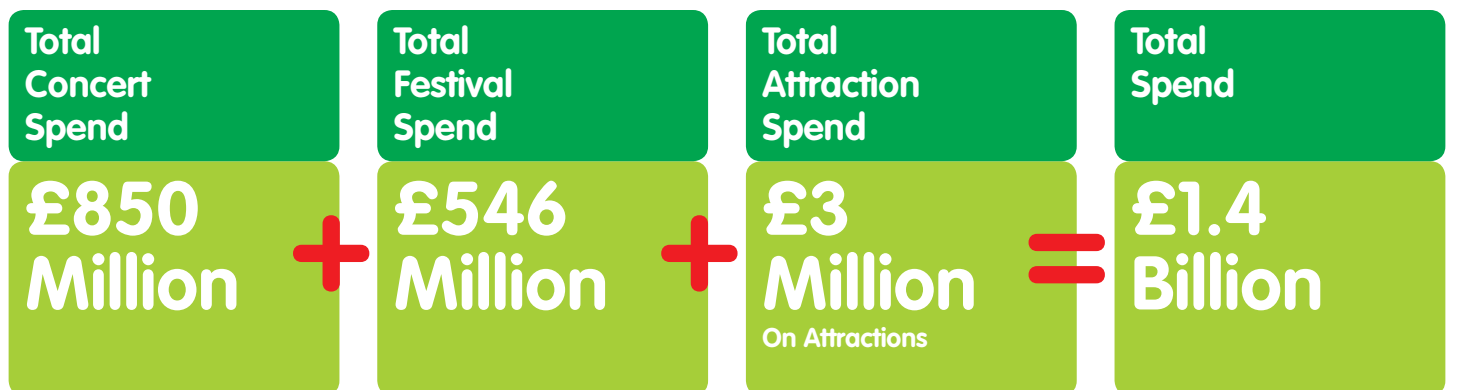
Our analysis shows that overseas tourists whom we define as music tourists spend nearly a quarter more while in the UK than the average overseas tourist whose visit is not primarily motivated by music.

The Relative Size of Different Types of Music Tourism Spending

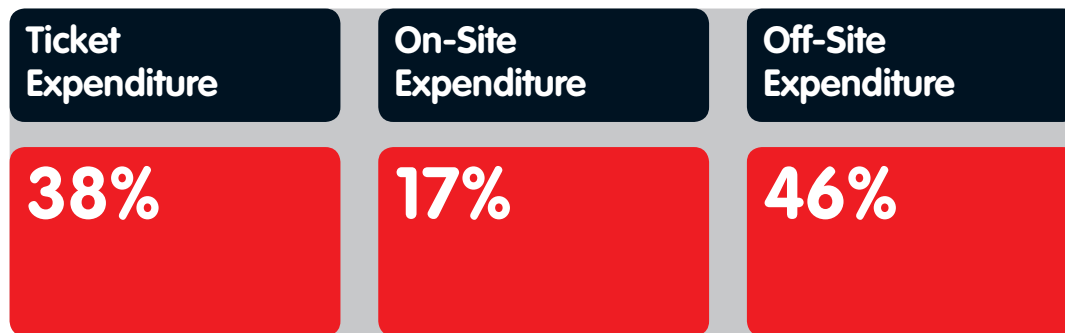
Visits to concerts are by far the largest element in music tourism, as there are so many more concerts than festivals. However, music tourists attending festivals tend to spend more than those attending concerts.



Spending by Music Tourists



Expenditure Breakdown:



The lion's share of expenditure by dedicated music tourists is off-site, meaning that their tourist pound is spread within the host region to the benefit of local hotels, restaurants, and other providers of goods and services.

The 19,700 jobs that music tourism sustains are varied and many are highly skilled. From niche festival consumer products to healthy fast-food vendors to specialist financial or technical services. This report shines a spotlight on the vibrant economy that is blossoming as a direct result of the UK's enviable live music scene.

Of course, all of this activity stems from the musical talent of the artists - and the investment in that talent - that attracts so many music tourists in the first place.

This report focuses on the economic contribution that music makes to the tourism economy. Future analysis might usefully include the contribution that live music makes to new measures of our national well-being. As fans attest, the exuberant experience of attending a live music event can become habit-forming. Our research suggests that a generation of young people are already factoring their favourite live music events into their annual holiday plans.

The challenge for policy-makers is to capture the demand for live music experiences right here in the UK.

Max Robertson Consultant Robertson Taylor

www.robertson-taylor.com

"My father Willie and his business partner Bob Taylor set up Robertson Taylor in 1977 and pioneered many of the insurance policies that are today accepted as standard in the industry.

"Robertson Taylor has arranged insurance for nine of the top ten world grossing tours of all time. In 2009, we arranged cover for four of the top five world grossing tours of that year. We provide insurance cover from multi-million pound tours to policies for new bands and festivals.

"We have expanded our insurance broking beyond live music to film, television and theatre productions, however the revenue that comes in from insuring tours and music festivals remains the core of our business. We are seeing this revenue grow year-on-year and we are consistently busy all-year round."

A Note on Definitions

As with every analysis, a significant challenge is to set definitions for the subject under analysis.

For this report, we defined an “overseas music tourist” as someone who booked a ticket to a live music event in the UK while still in their own country, prior to travelling.

We defined a “domestic music tourist” as someone who booked a ticket to the live music event in advance, and who travelled outside their own region to attend the event (or in the case of Scotland, Wales or Northern Ireland, outside their own nation).

However, we acknowledge that the rigidities of any definition will inevitably exclude some people who should, in their specific circumstances, be classified as a tourist, and vice-versa.

This is particularly true for Scotland, Wales and Northern Ireland. For example, travel within these nations is not classified as music tourism, so someone travelling from the Orkney Islands to Glasgow would not count as a music tourist despite the travel time involved.

Scope of this research

Our analysis focused on music events with capacities greater than 5,000 as they are most likely to attract visitors from outside the local area. An inherent drawback to this approach is that it excludes niche and special interest events that may attract a large number of dedicated enthusiasts from outside the region who are drawn to that specific event.

Our ticketing analysis included only music events that carried an entry fee. A drawback to this is that it excludes free concerts and festivals that may draw a significant number of visitors from outside the region.

We only included events where the performance of music was the sole or main element of entertainment. For example, we did not include musicals, ballet, opera or street festivals in our calculation such as the Notting Hill Carnival.

The focus of analysis in this report was live music. We also included a snapshot of music attractions to illustrate their role in music tourism. However, the data we provide on music attractions is merely illustrative, and not intended to be representative.

We acknowledge that the definitions we use err on the side of caution, and that the actual value of music to the tourism economy is therefore likely to be greater than our study reports.

Spending figures for domestic tourists include spending for the whole of the trip to the music event. Spending figures for overseas tourists includes spending for the whole stay in the UK.

The calculation for regional GVA figures includes 50% of travel expenses, to represent the part that is likely to be paid to companies based in that region. The other 50% is not allocated to specific regions, but calculated instead in the UK total figures (in the case of domestic tourists only).

Rounding up/down to the nearest percentage point will mean that totals do not exactly equal the sum of the parts in some calculations.

Academics and researchers may wish to refer to the University of Bournemouth’s International Centre for Tourism and Hospitality Research for further details on the methodology used in the analysis.

Paul Newman
Head of Entertainment & Ticketing
AEG Europe - Owners & Operators of The O2
www.theo2.co.uk

“Since opening in 2007 The O2 has taken the music world by storm and has consistently hosted the world’s best in music and entertainment - selling more tickets than any other arena in the world every year since its launch.

“For us it is all about content and customer experience. The O2 has hosted the hottest live music acts around such as Beyonce, Rolling Stones, Lady Gaga, 8 nights of Take That, 12 nights of Bon Jovi, 18 nights of Spice Girls, a record 21 night Prince European residency, and the much acclaimed Led Zeppelin gig,

“It’s not all about the arena - we’ve created reasons to visit other than just big shows. indigO2 our smaller, more intimate music venue, hosts anything from the latest urban music sensation, to classical music, to comedy.

“The O2 bubble, our state of the art exhibition space is the permanent home to the British Music Experience, the UK’s only exhibition dedicated to rock and pop; 26 bars and restaurants and an 11 screen Cineworld cinema complex are just some of the other reasons why The O2 sees over 7.5 million visitors a year and provides a significant contribution to the London economy in the process.”

NATIONS & REGIONS

From Tin Pan Alley and the coffee bars of Soho, to Liverpool and the Merseybeat boom – ignited, somewhat fortuitously, by the arrival of imported blues and RnB 45’s to Liverpool’s Albert Dock – the UK’s post-war music history is defined by geography.

By 1963 The Beatles had moved south – helping London swing and kickstarting a counterculture soundtracked by the Stones, The Who, The Kinks, Pink Floyd and a host of others. In ensuing decades, musical scenes have gained ascendancy in Birmingham, Sheffield, Manchester, Leeds, Bristol, Glasgow, Cardiff and Coventry - forged around individual artists, a label, a

club, a record shop or even a sound.

Sheffield, for instance, still reverberates to an electronic beat, pulsing from Cabaret Voltaire and Human League through to Warp Records and Gatecrasher; as well as the wry lyricisms that tie Pulp and Arctic Monkeys.

A cocktail of native and immigrant cultures sparked Birmingham’s reggae scene, 2 Tone in Coventry and all manner of bass-heavy genres in Bristol.

The phenomenon is evident today: Dubstep is pure Croydon; Grime means East London. Innovation is determined by geography, timing and circumstance.

And the wider impact can be extraordinary. In Liverpool, the reverberations of four lads who shook the world remain all powerful. On arrival at John Lennon airport, tourists can enjoy days – literally – of Beatles – related activities. The City Council estimates fan – related tourism attracts 600,000 people to the city every year.

The rise of acid house (its epicentre: the Hacienda) aligned with a succession of great Northern bands (from Joy Division/New Order to The Smiths, Happy Mondays and The Stone Roses) defined Manchester in the 80s and early 90s, and ensured the university was massively oversubscribed with prospective students.

In 2010, Croydon’s Local Government development strategy identified its creative industries, exemplified by its BRIT school and dubstep alumni as, “arguably one of the sectors with the best chance of positively changing Croydon’s image.”

And this is only a snapshot. The UK’s music is not homogenous. It is a regional thing, encompassing the Shetland Islands Folk Festival, Balado’s T In The Park, the Leicester Belgrave Mela, Glyndebourne’s summer festival, Notting Hill Carnival & St Austell’s Eden Sessions.

This is what makes us unique. A sound as distinctive as our patchwork of accents and cultures.

Geographical Distribution of Music Tourism Visits

Scotland

187,000 Music Tourists
2% UK Share

Wales

252,000 Music Tourists
3% UK Share

N. Ireland

166,000 Music Tourists
2% UK Share

Yorkshire / Humberside

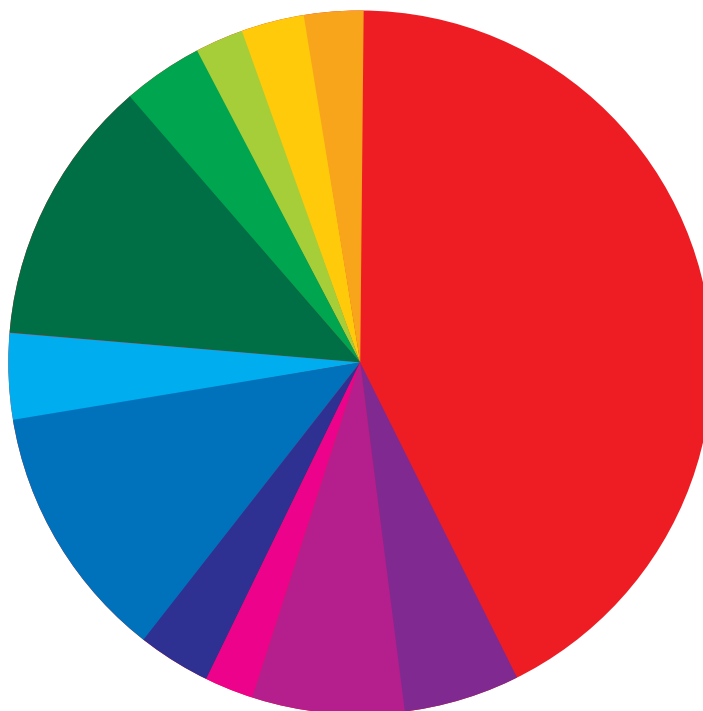
274,000 Music Tourists
4% UK Share

North West

965,000 Music Tourists
12% UK Share

North East

286,000 Music Tourists
4% UK Share



Total

7,778,000 Music Tourists

London

3,303,000 Music Tourists
43% UK Share

South East

429,000 Music Tourists
6% UK Share

South West

541,000 Music Tourists
7% UK Share

East of England

176,000 Music Tourists
2% UK Share

East Midlands

259,000 Music Tourists
3% UK Share

West Midlands

942,000 Music Tourists
12% UK Share

LONDON

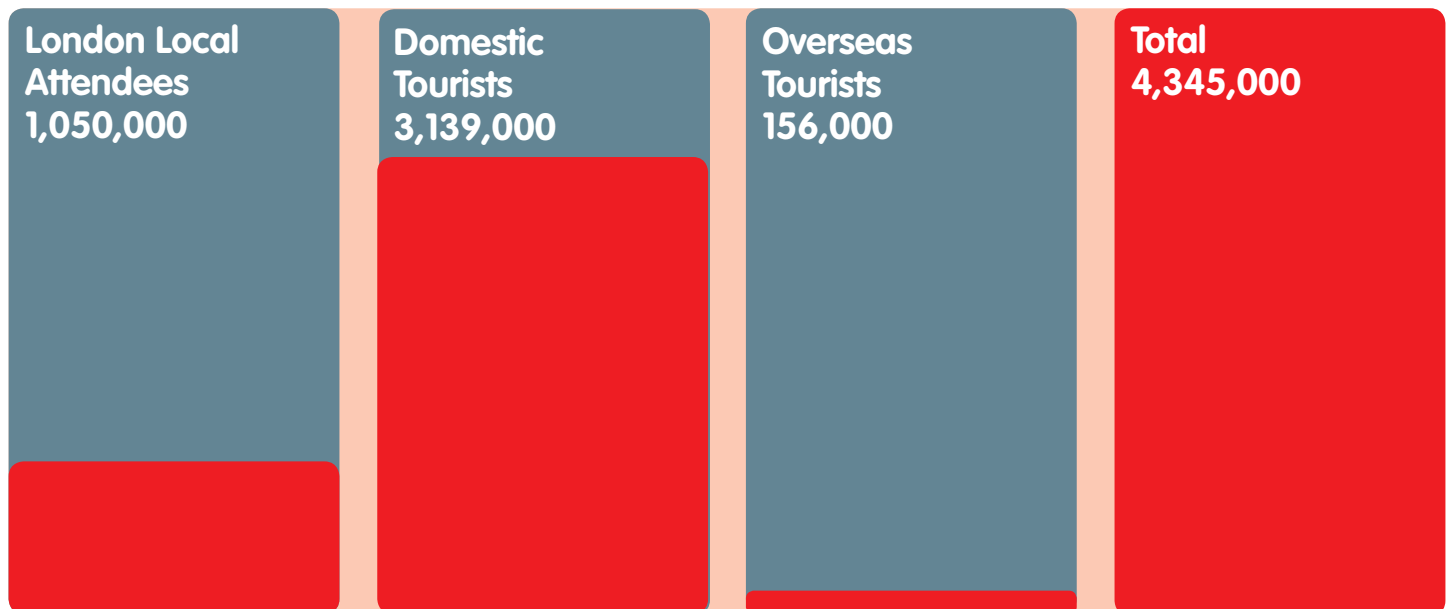
London dominates the UK as a destination for live music tourism. Music tourists outnumber local music fans at major gigs in the capital at a rate of three to one. London's dominance is largely due to the high numbers of domestic music tourists attending concerts, which reflects the number of large music venues in the capital.

With a population of **7.7 million**, the London region is host to the O2 Arena, the world's most successful concert venue, as well as Wembley Stadium and Arena and the Royal Albert Hall to name but a few.

Its parks such as Hyde Park, Victoria Park and Clapham Common are home to a growing number of "non-residential" music festivals.

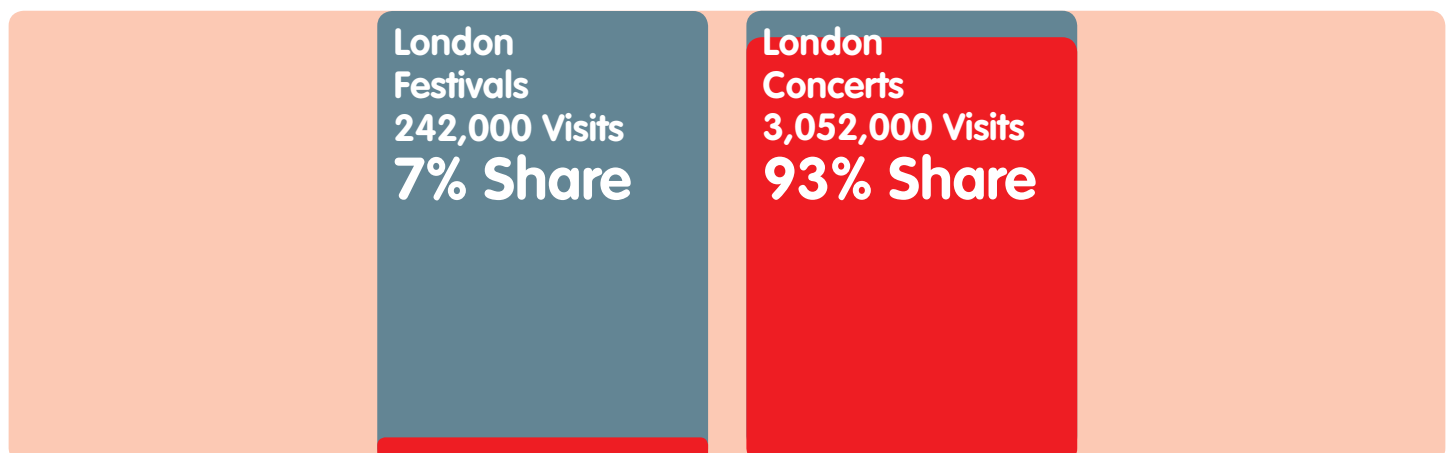
London attracts **3.3 million** music tourist visits, which accounts for **43%** of all music tourists visits in the UK, and **31%** of all music tourism spending in the UK. London has a lower share of music tourism spending than it does music tourism visits because London's music tourism is made up mainly of visitors to concerts, who spend less than visitors to festivals.

London Attendances



London Music Tourist Attendances: Festivals vs Concerts

Concerts account for the vast majority of music tourism visits to the capital, which is a reflection of the large number of venues that London boasts.



London Music Tourist Spending: Festivals vs Concerts

Spending at concerts accounts for 83% of the total amount of music tourism spending in the capital.

London
Festivals
£73 Million
17% Share

London
Concerts
£353 Million
83% Share

David Nye Founder The Great British Sausage Co

www.britishsausages.co.uk

[Based in London]

"We have been trading at UK music festivals for over 6 years. I started the company after attending a couple of music festivals. I could not get a good feed. The catering was dominated by the 'cream and greens' burger vans serving all the same fast food.

"I was working as a chef in Norfolk at the time, having finished hospitality school in Glasgow. I started with a small tent and a couple of BBQ's and did a deal with a local butcher to sell great quality pork sausages. These proved very popular.

"We are now involved in the manufacturing of the sausages. They are made to our own recipe. All the pork comes from one farm in Essex and our venison from the Knebworth

Park estate in Hertfordshire. We get through over 50 tons of sausages a year. We sell them online and at many food exhibitions up and down the country.

"Two years ago I introduced the I LOVE SAUSAGE brand to promote good quality sausages at music festivals. It was set up as a revolution to promote good quality British farm assured sausages at outdoor events. We also sell T-shirts and refillable mugs so as not to use any disposable cups.

"Being environmentally friendly is very important to operating at UK festivals. All the tea must be fair trade and packaging biodegradable.

"As it has been increasingly expensive to go abroad, people have been going to UK festivals instead for their annual holidays. With this, we've seen a huge increase in demand for better quality food, especially if punters are at an event for sometimes nearly a week.

"We offer theatre on our stand, with everyone seeing us cooking our sausages from fresh with lots of fun and passion and hiding nothing."

London Music Tourist Attendances: Domestic vs Overseas

The majority of London's music tourists are UK residents who are drawn to the capital from other parts of the country.

London
Domestic
3,145,000 Visits
95% Share

London
Overseas
157,000 Visits
5% Share

London Music Tourist Spending: Domestic vs Overseas

London
Domestic
£395 Million
93% Share

London
Overseas
£32 Million
7% Share

In total, music tourists in London spend at least **£426 million* a year**, benefitting the London economy by **£260 million in terms of GVA** and sustaining the equivalent of **4,445 full time jobs** in the capital.

Guillaume Pouget Paris

"I live in Paris and I have attended the Field Day Festival in Victoria Park in London every year since 2008."

* Attributable Regional Spending

The amount of spending directly attributable to each nation and region is limited to measurable elements such as ticket price, on the night spending, and some transportation costs.

A substantial proportion of spending cannot be allocated to specific regions. For example, an overseas music tourist staying in the UK for 7 days might spend 3 nights in one region and 4 in another.

In total, £155 million of spending in the UK by overseas music tourists, and £36 million of spending by domestic tourists, is unallocated to any particular nation or region. But all nations and regions will, in actuality, share in this £191 million of unallocated spending.

SOUTH EAST REGION

With a population of **8.4 million**, the most populous region in the UK, the South East plays host to an array of events including the Reading festival, the Hop Farm Festival, Guilfest, the Isle of Wight Festival, the Cornbury Festival, The Great Escape, Bestival, the Rewind Festival and others as well as the National Bowl and Brighton Centre arenas.

The South East region attracts around **430,000** music tourism visits, which is **6%** of all music tourism visits made in the UK.

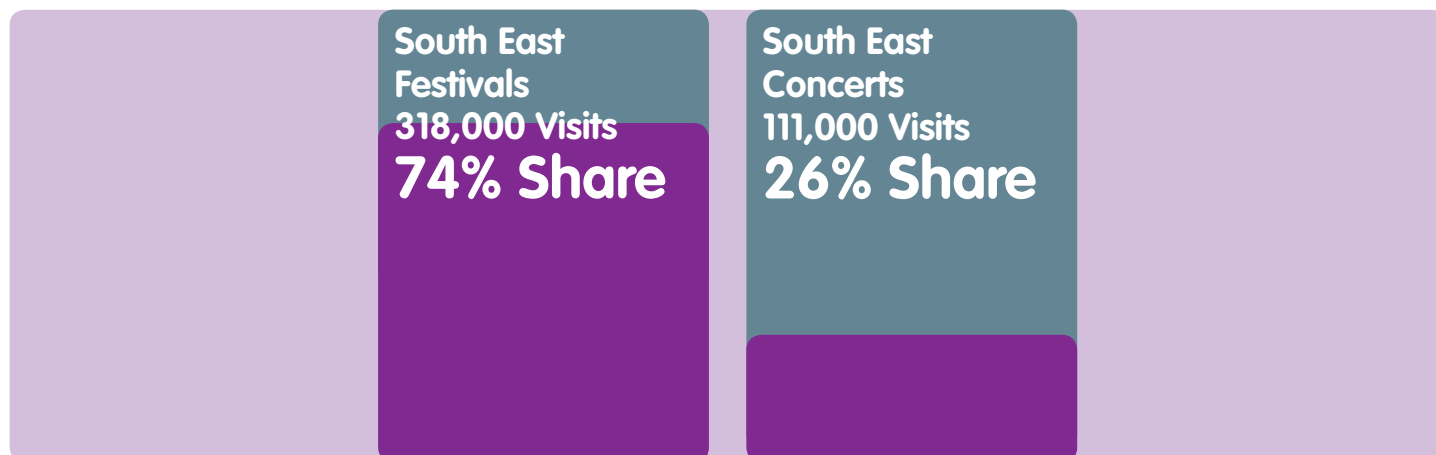
On average, around half of the audience at major music events in the South East are music tourists from outside the region.

South East Regional Attendances



South East Music Tourist Attendances: Festivals vs Concerts

The South East's many music festivals attract three times as many music tourists as concerts. While festivals account for only **21%** of the UK's total music tourist visits, they account for **74%** of the South East's music tourists visits.

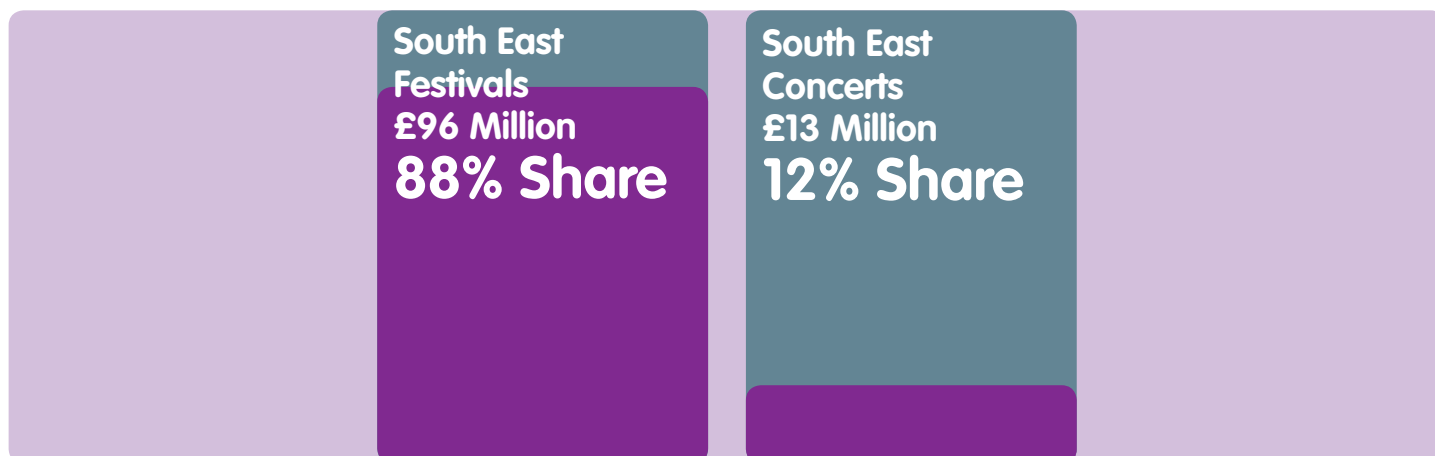


Andy Mead
Managing Director
Firefly Solar - Portable Solar Generators
www.fireflysolar.co.uk [Based in Brighton]

"Live music is the first market we entered when we started the company. We have now diversified to serve a number of sectors, but the live music industry still represents a substantial proportion of our annual income and we have seen this rise year on year."

South East Music Tourist Spending: Festivals vs Concerts

Because festival goers spend more than concert goers, the South East enjoys a greater share of the UK's total tourist spending at **9%** than its UK total's share of music tourist visits at **6%**.



READING FESTIVAL 2009 SURVEY DEMONSTRATES IMPACT TO ECONOMY

Last year Festival Republic commissioned an Economic Impact Assessment for the 2009 Reading Festival.

It found that total gross spend was over £31 million. 90,000 festival attendees spent an estimated £19,000,000 across the August Bank Holiday weekend, spending an average of £209 per visitor - excluding entry ticket, but including transport.

Melvin Benn, Managing Director of Festival Republic said:

"Festivals and the live music industry contribute significantly to the British economy and this survey also demonstrates that the local Reading community benefit enormously, which is what I had hoped to see."

South East Music Tourist Attendances: Domestic vs Overseas

The proportion of domestic tourists relative to overseas tourists is slightly higher than national figures. Domestic music tourists account for **97%** of all music tourist visits.

South East
Domestic
417,000 Visits
97% Share

South East
Overseas
13,000 Visits
3% Share

South East Music Tourist Spending: Domestic vs Overseas

South East
Domestic
£102 Million
94% Share

South East
Overseas
£7 Million
6% Share

In total, music tourists in the South East spend at least **£109 million* a year**, benefitting the South East economy by **£22 million a year in terms of GVA** and sustaining the equivalent of **486 full time jobs**.

Brian West
Director
Funky Leisure Ltd
Republic

www.funkyleisure.co.uk
[Based in Twickenham]

"We launched our site

in July 2006 with our sunflower patterned tent design. Music festivals are the backbone of our business. We start getting busy at the start of the festival season in early May and our busiest week by far is always in

June - the week before Glastonbury. This busy period continues right through to Bestival in September. Sales also increase around Christmas as we have a 'Gifts for Festival Goers' category."

“Music fans travel from all over the world to stay at our hotels during festival season.”

Nick Fox

Owner

Central Reading Hotels

www.centralreadinghotels.com

“Our rooms are converted Victorian houses literally around the corner from the Reading Festival site. We have 55 rooms and we are always sold out during festival weekend.

Music fans travel from all over the world to stay at our hotels during festival season – they come from places as far away as Australia, Japan and America, as well as France, Holland and Germany.”

“At V South, 4 tonnes of meat were consumed and we served around 12,000 meals in 12 days!”

Steve Jones

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“I’m Steve and I’m going to the Isle of Wight Festival this year with my wife, Nicola. I’m a computer programmer and she’s a nurse. We’ll be meeting up with a big group of friends, half of whom we only know from festivals past. We take time off work and hire a car and the overall cost is comparable to a cheap week’s holiday in France, so I definitely think of it as being one of my holidays of the year.”

Mary Shelley-Smith

Global Operations Director

Eat to the Beat

www.eattothebeat.com [Based in Buckinghamshire]

“Eat to the Beat are suppliers of crew and artist catering for live music events and festivals.

“At V South, 4 tonnes of meat were consumed and we served around 12,000 meals in 12 days!”

“We have been running for 27 years and festival catering has featured highly in our business for all that time. We have catered in the UK, Europe and USA for festivals such as V, Reading, Leeds, Glastonbury, Big Chill, Latitude, Bestival, Download, Wireless, Hard Rock Calling, Oxegen, Coachella, ATP New York and Virgin Festival.

“The last week in June is the busiest of the year. There is the Glastonbury Pyramid stage, Glastonbury Other stage, BBC Glastonbury, the Aggreko compound as well as being at Hyde Park with Hard Rock Calling and on top of that we are also out with other touring shows! We had over 100 crew working in various locations throughout the UK over that weekend!”

SOUTH WEST REGION

With a population of **5.2 million**, the South West region is host to Glastonbury, the largest outdoor music festival in the world. It also hosts Camp Bestival, T4 on the Beach, the Sunrise Celebration, the Eden Sessions, Greenbelt and WOMAD amongst others.

The South West region attracts **540,000** music tourist visits, which is **7%** of all music tourism visits in the UK. Songwriter revenues from live music in the South West doubled in the three years to 2009. *

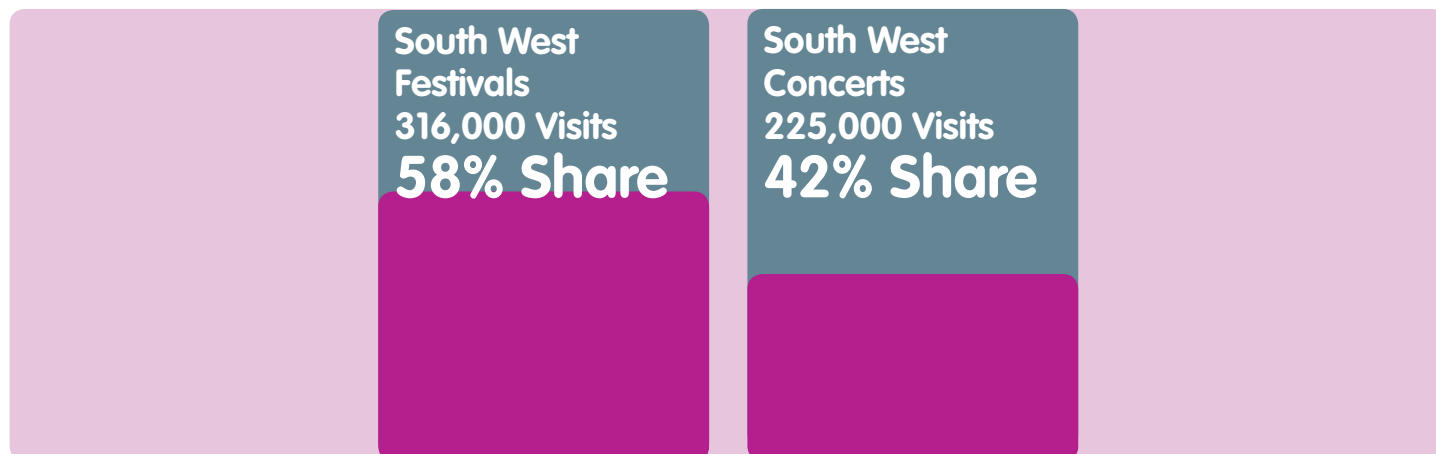
South West Attendances

Locals outnumber music tourists from outside the region.



South West Music Tourist Attendances: Festivals vs Concerts

Festivals attract a greater proportion of music tourists to the South West than concerts.



Penny Manager Petrol Station, Glastonbury Area

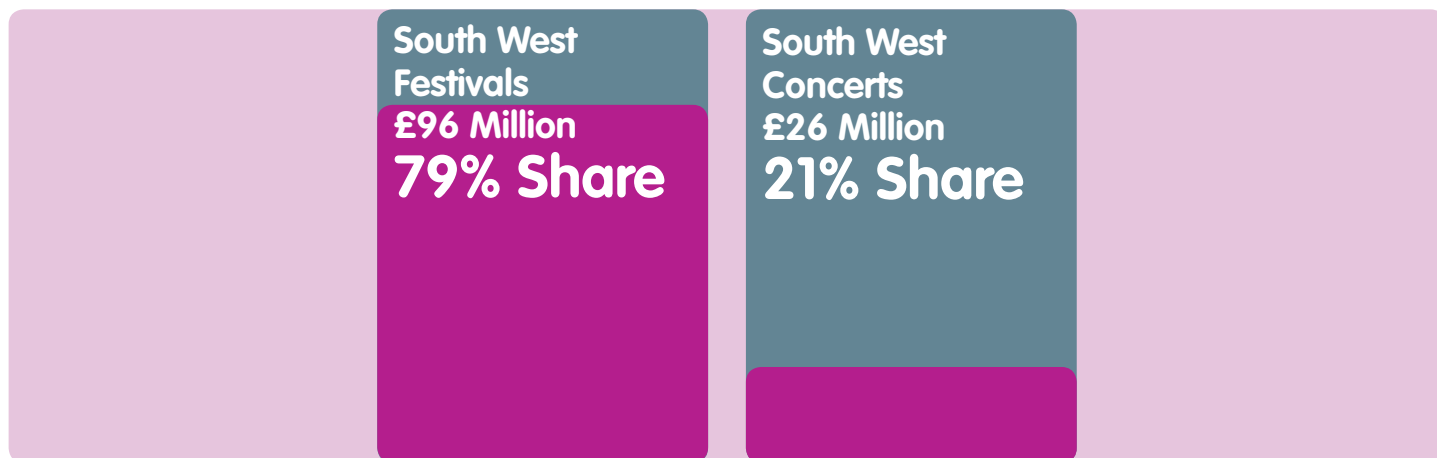
"Glastonbury generally creates a huge amount of business for us, tripling normal sales. Aside from purchasing petrol the most popular item fans tend to purchase from us is water. During festival season we stock extra products including camping chairs, torches and sky lanterns. We've noticed many of the fans travelling to the festival by car are from overseas, particularly from Germany."

* Will Page and Chris Carey (2010) 'Adding Up the UK Music Industry for 2009'; Available: www.prsformusic.com/economics

** Data on the number of overseas visitors to Glastonbury was not available so estimates are based on overseas visitor proportions at other large music festivals.

South West Music Tourists Spending: Festivals vs Concerts

Because festival goers spend more than concert goers, the South West enjoys a greater share of the UK total music tourist spending at **10%** than its UK total share of music tourist visits at **7%**.



Miranda Grafftey-Smith, Owner

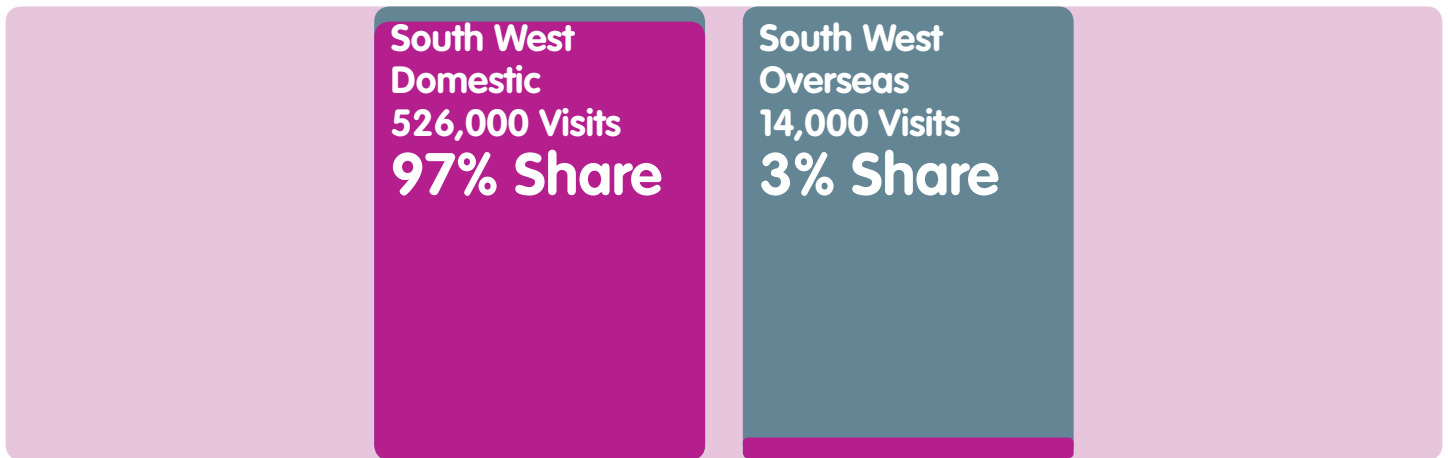
The Manor House Bed and Breakfast, Rodbourne, Near Malmesbury in Wiltshire

www.manorhouserodbourne.com

"WOMAD takes place at the end of July and the festival site is literally five minutes from our B&B. The Manor House, Rodbourne is our home and we have four double rooms with bathrooms available. When WOMAD first came here four years ago, the locals were sceptical. But it has been nothing but good for the local area and economy. Residents in the area are offered half price tickets to encourage them to go to the festival. There's always a really nice crowd at WOMAD with people from all over the world, lots of families with young children and there's never any trouble. We were fully booked for WOMAD 2011 by October 2010."

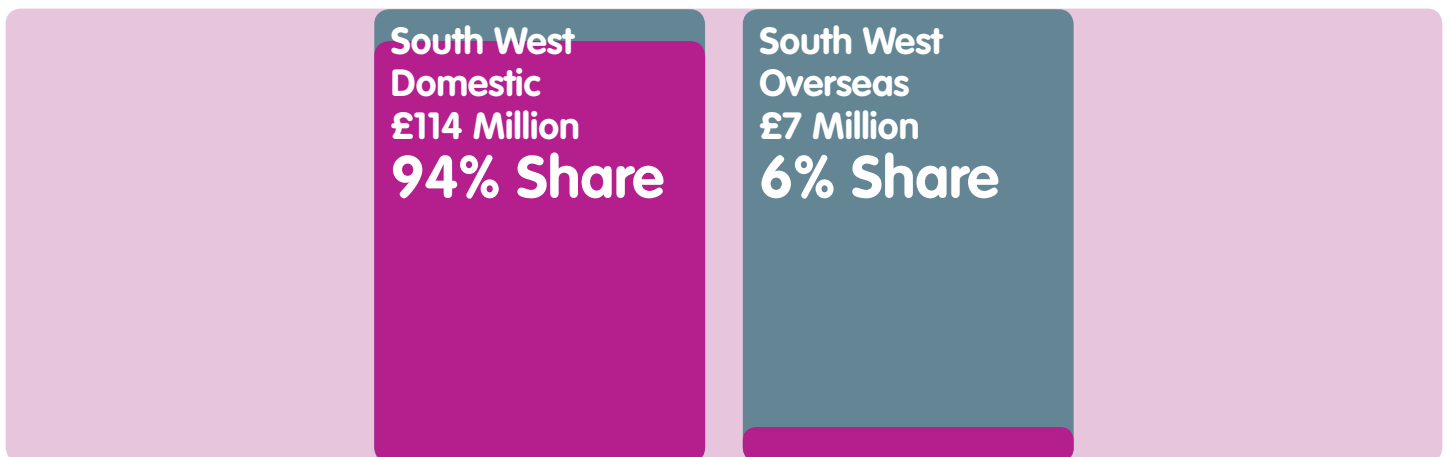
South West Music Tourist Attendances: Domestic vs Overseas

Domestic tourists account for **97%** of all music tourist visits to the South West.



South West Music Tourists Spending: Domestic vs Overseas

Overseas visitors account for **3%** of music tourism visits to the South West, but they account for **6%** of music tourism spending.



In total, Music Tourists in the South West spend at least **£121 million* a year**, benefitting the South West economy by **£35 million a year in terms of GVA** and sustaining the equivalent of **869 full time jobs**.

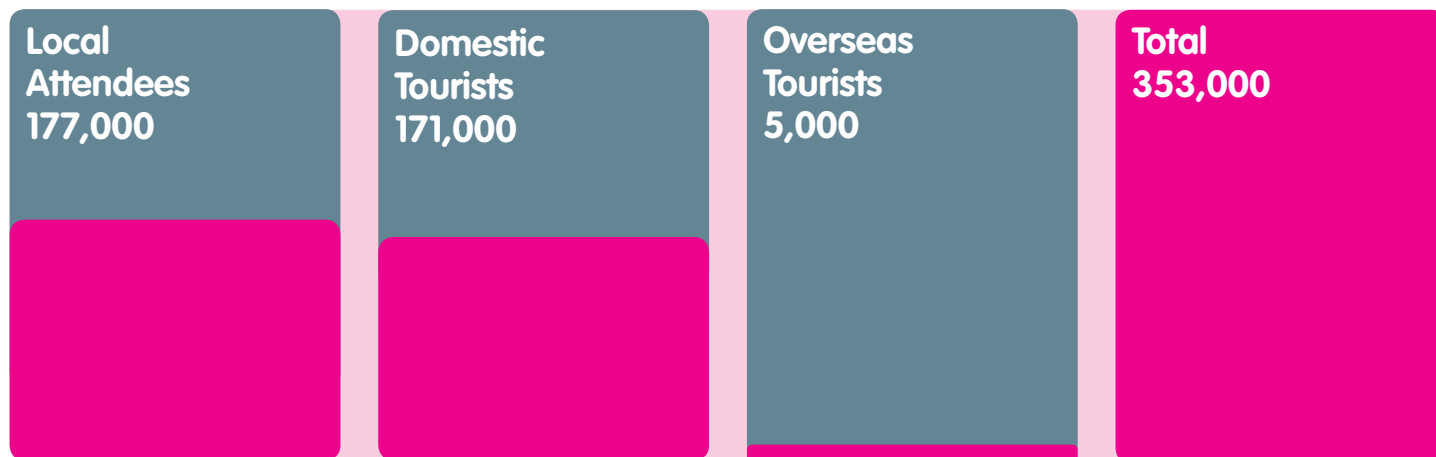
EAST OF ENGLAND REGION

With a population of **5.7 million**, the East of England is host to such notable festivals as the V Festival, the Big Chill, Latitude, the Secret Garden Party, Sonisphere, and the Cambridge Folk

Festival, amongst others. The East of England accounts for **176,000** tourism visits, which is **2%** of all music tourist visits in the UK.

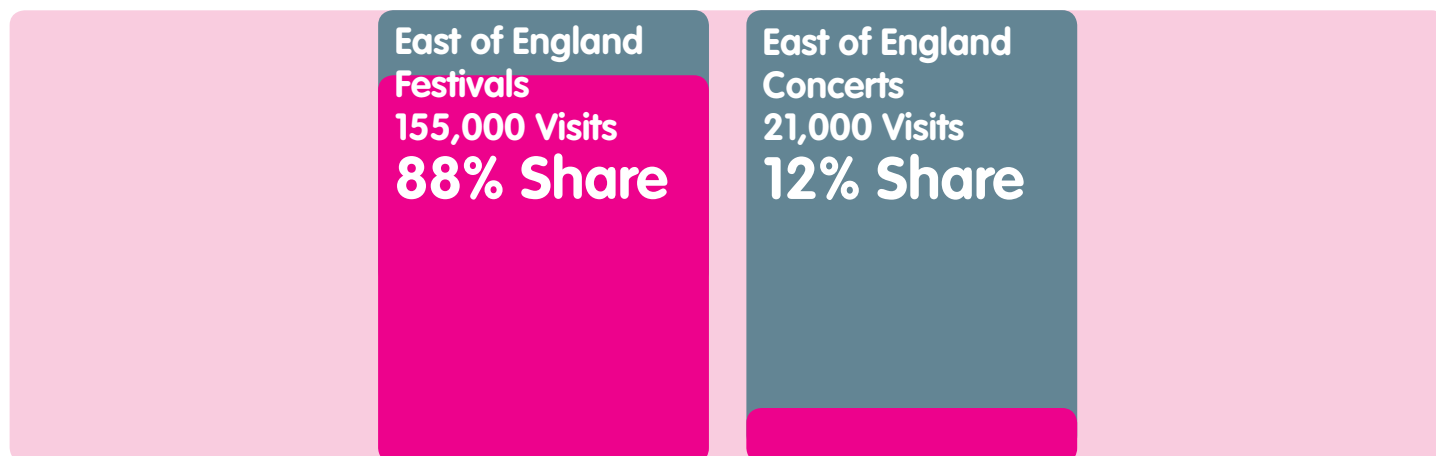
East of England Regional Attendances

On average, around half of the audience at major music events in the East of England are music tourists from outside the region.



East of England Music Tourists Attendances: Festivals vs Concerts

Festivals in the East of England account for **88%** of all music tourism visits in the region, the highest proportion in the UK. Festivals attract more than seven times the number of music tourists to the region than concerts.



Eddie Barcan Folk Festival Manager

www.cambridgefolkfestival.co.uk

"Cambridge is a small but internationally prolific city attracting 4 million tourists each year, many from overseas. It is most

notable for its prestigious university but also for The Co-operative Cambridge Folk Festival, arguably the most famous folk festival in the world which broadens the city's cultural mix and each year pulls in 14,000 customers from across the UK. During the

period of the Festival many local businesses benefit. All nearby hotels are full and there is an upturn in trade for local and city centre shops, restaurants and transport."

East of England Music Tourist Spending: Festivals vs Concerts

Spending at festivals by music tourists accounts for **95%** of all music tourism spending in the East of England, compared to just **39%** in the UK as a whole.

East of England
Festivals
£47 Million
95% Share

East of England
Concerts
£2 Million
5% Share

East of England Music Tourist Attendances: Domestic vs Overseas

Domestic tourists account for **97%** of all music tourist visits to the East of England.

East of England
Domestic
171,000 Visits
97% Share

East of England
Overseas
5,000 Visits
3% Share

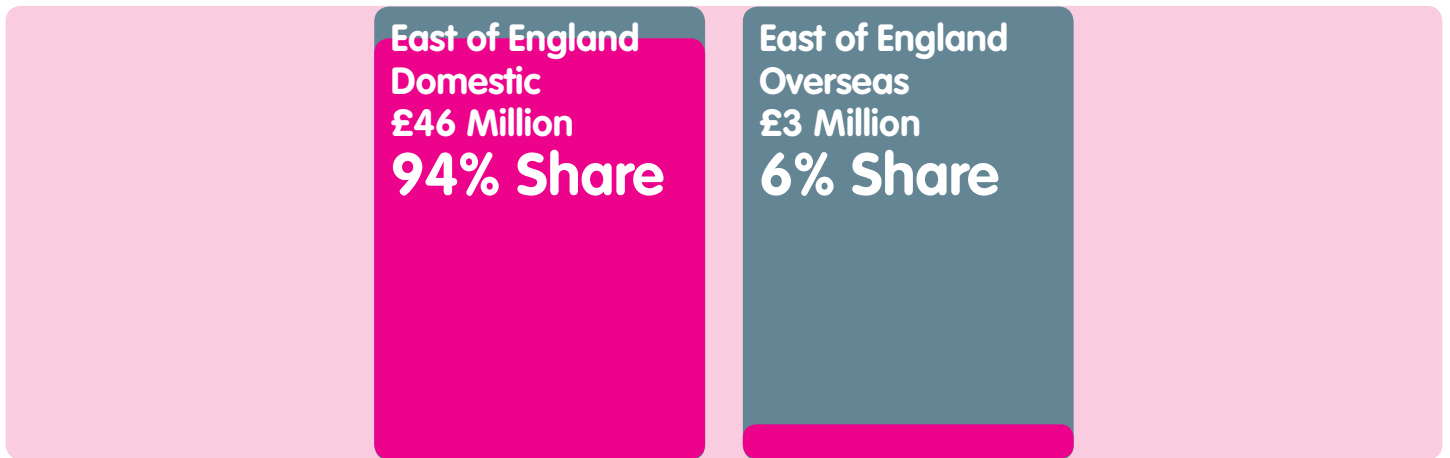
Madge Clay 24 Bristol

"After going to The Secret Garden Party a couple of years ago I have been desperate to go back! Thankfully I am this year, and I can't wait! This festival has so much to offer everyone, it is great fun, full of great music and people. It is truly unique and it's a weekend

of pure escapism! I love going to festivals - they are like mini holidays for me, and I live for the summer and for my chance to pack up my tent and go!"

East of England Music Tourist Spending: Domestic vs Overseas

Overseas visitors account for **3%** of music tourism visits to the East of England, but they account for **6%** of music tourism spending.



In total, Music Tourists in the East of England spend at least **£49 million* a year**, benefitting the East of England economy by **£15 million a year in terms of GVA** and sustaining the equivalent of **344 full time jobs.**

Jason Thorpe One Stop Festival Festival Camping Equipment

www.onestopfestival.com
[Based in Cambridgeshire]

"One Stop Festival Ltd started as a result of my experiences when attending festivals. Every year I would leave it far too late to acquire my tent and equipment resulting in a frantic search online to have something delivered at short notice or jump in the car and try to hunt the items down locally.

"I found that suppliers whilst catering for campers in general didn't have some of the quirky things that a festival goer is looking for, meaning I had to go to more than one retailer to purchase my festival pack of goodies.

"Based on this frustration I decided to launch www.onestopfestival.com in 2007 and we have continued to expand rapidly by offering excellent levels of service and giving people what they want delivered to their door the next day.

"In recent years as the global economy has slowed and the pound has lost value against many currencies, we have noticed that young people who would of traditionally had a week or two away are instead going as groups to one or more festivals in the UK.

"We've found that while people are willing to cut back elsewhere in their life they are not going to give up the annual festival experience. For many, this has become the only time in peoples busy live's when friends can actually spend time together."

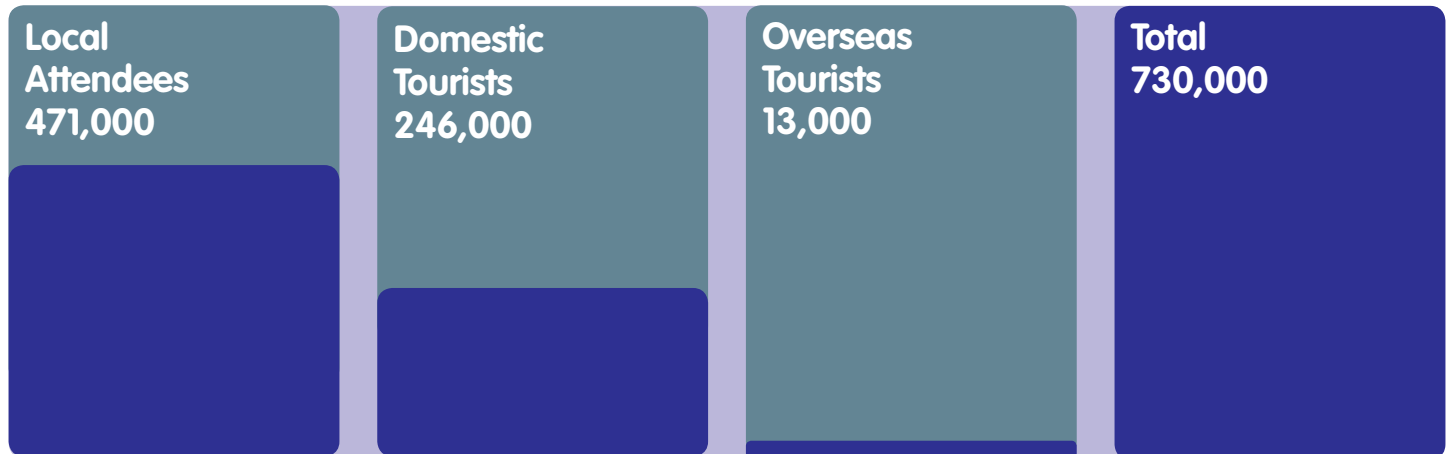
EAST MIDLANDS REGION

With a population of **4.4 million**, the East Midlands region is host to the Summer Sundae Weekender, Bloodstock, Ska Splash and Download festivals, as well as the Capital FM

arena in Nottingham amongst others. The East Midlands attracts around **260,000** music tourist visits which account for **3%** of all music tourist visits to the UK.

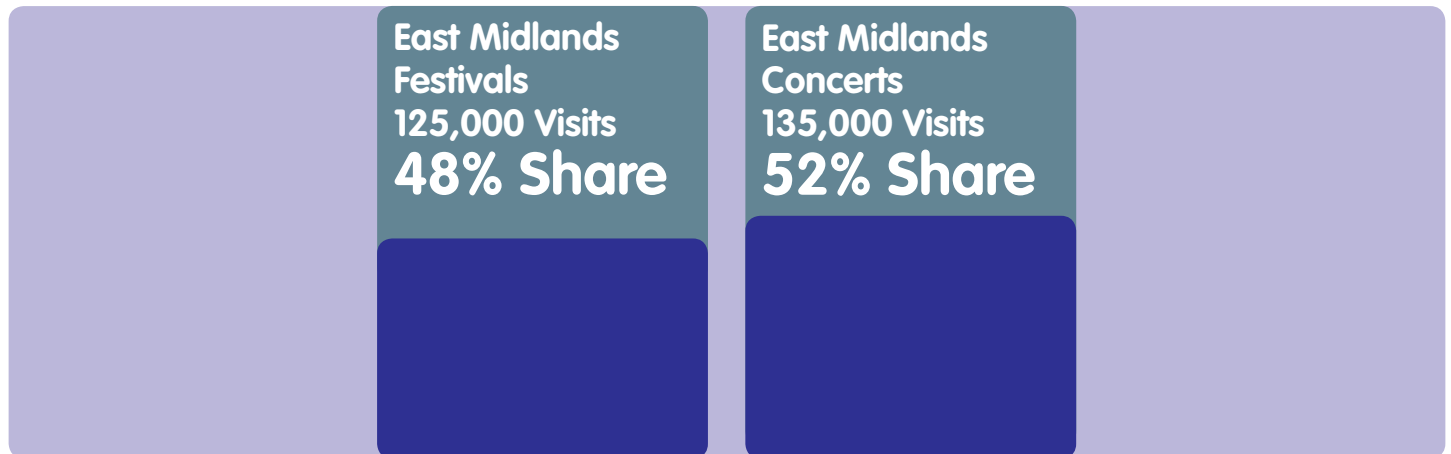
East Midlands Regional Attendances

On average, locals outnumber music tourists from outside the region at major music events in the East Midlands.



East Midlands Music Tourist Attendances: Festivals vs Concerts

Concerts attract slightly more music tourists to the region than festivals, but the balance between concerts and festivals is pretty even compared to many other regions.



Gabby Miller
Press Officer
De Montfort Hall
Leicester (home of
Summer Sundae
Weekender)

www.demontfordhall.co.uk
www.summersundae.com

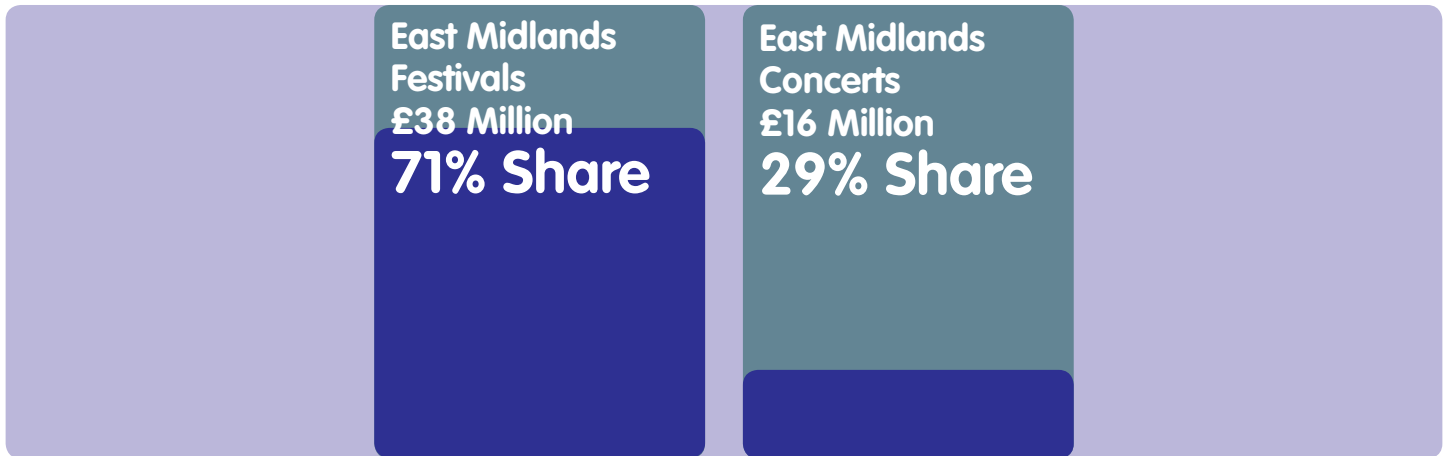
"2011 will be the 11th year of Summer Sundae Weekender. It has grown

from a one day, two stage festival to a 3-day 6-stage festival at Leicester's De Montfort Hall & Gardens with a capacity of 6,000. Lots of people buy tickets without camping and stay in local hotels. Leicester always gets extremely busy over Summer Sundae weekend."

Photo: Hollis Photography

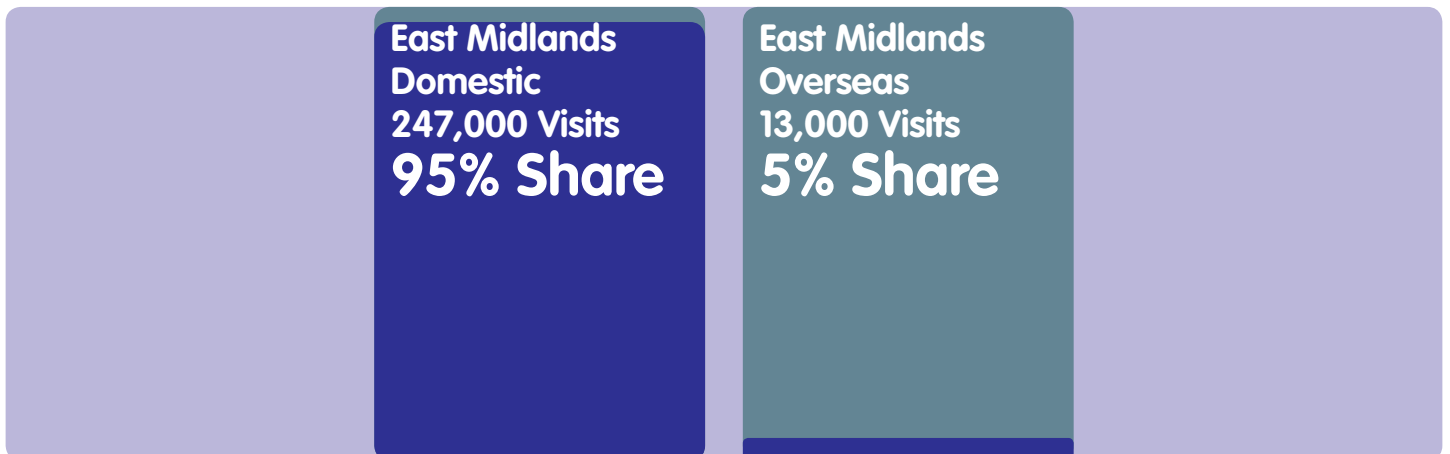
East Midlands Music Tourist Spending: Festivals vs Concerts

Festival goers spend much more on average than concert goers, so spending at festivals accounts for **71%** of total spending in the region by music tourists.



East Midlands Music Tourist Attendances: Domestic vs Overseas

The proportion of domestic music tourists relative to overseas music tourists to the East Midlands is consistent with the national average. Domestic music tourists account for the vast majority.



East Midlands Music Tourist Spending: Domestic vs Overseas

Overseas visitors account for **5%** of all music tourist visits, but **9%** of all music tourists spending.

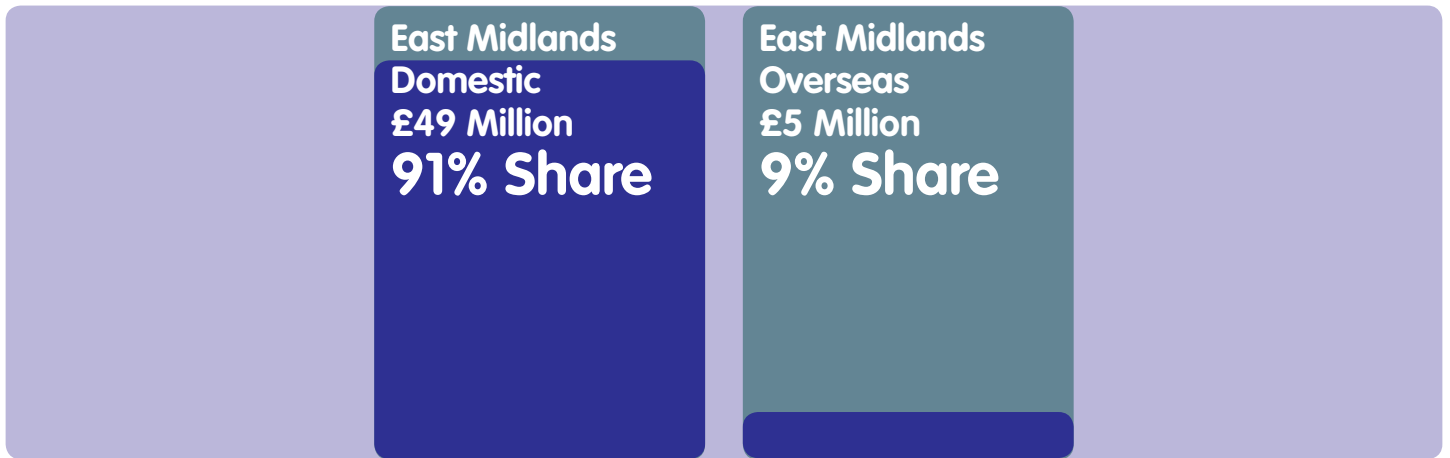


Photo: Ruairi Drayne

In total, Music Tourists in the East Midlands spend at least **£54 million* a year**, benefitting the East Midlands economy by **£12 million a year in terms of GVA** and sustaining the equivalent of **300 full time jobs.**

* The actual figure will be higher; please refer to page 16

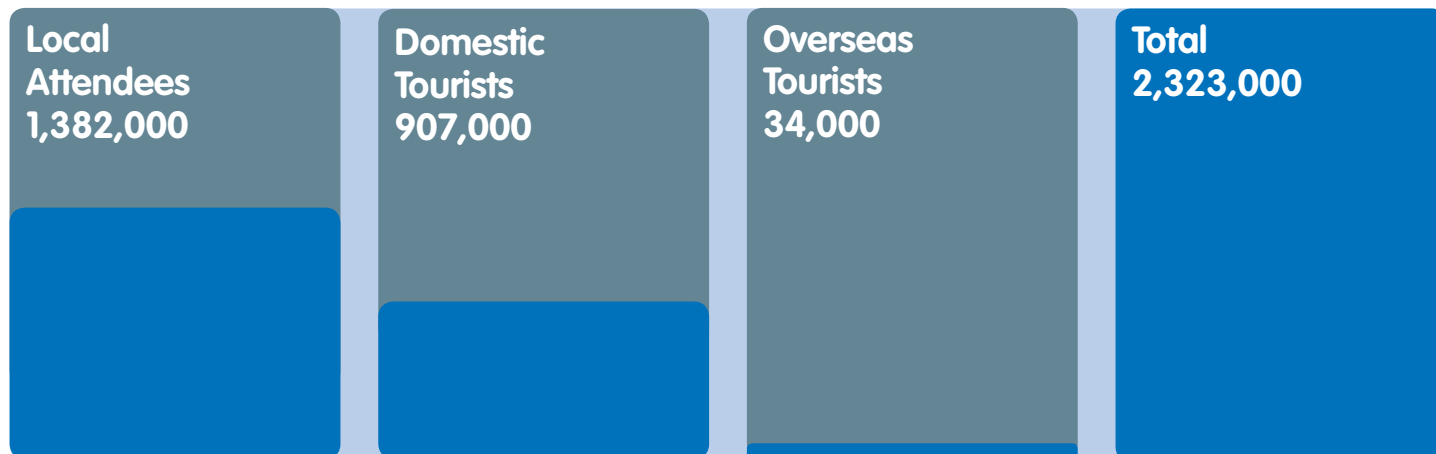
WEST MIDLANDS REGION

The West Midlands attracts **942,000** music tourist visits and enjoys a **12%** share of all music tourist visits to the UK. It is the third largest contributor to music tourism in the UK, after London and the North West.

With a population of **5.4 million**, the West Midlands is host to the V Festival, the Midlands Music Festival, the Acoustic Festival of Britain, and the Global Gathering dance festival to name a few, and arenas include the Birmingham National Indoor Arena, the LG Arena and the Ricoh Arena in Coventry.

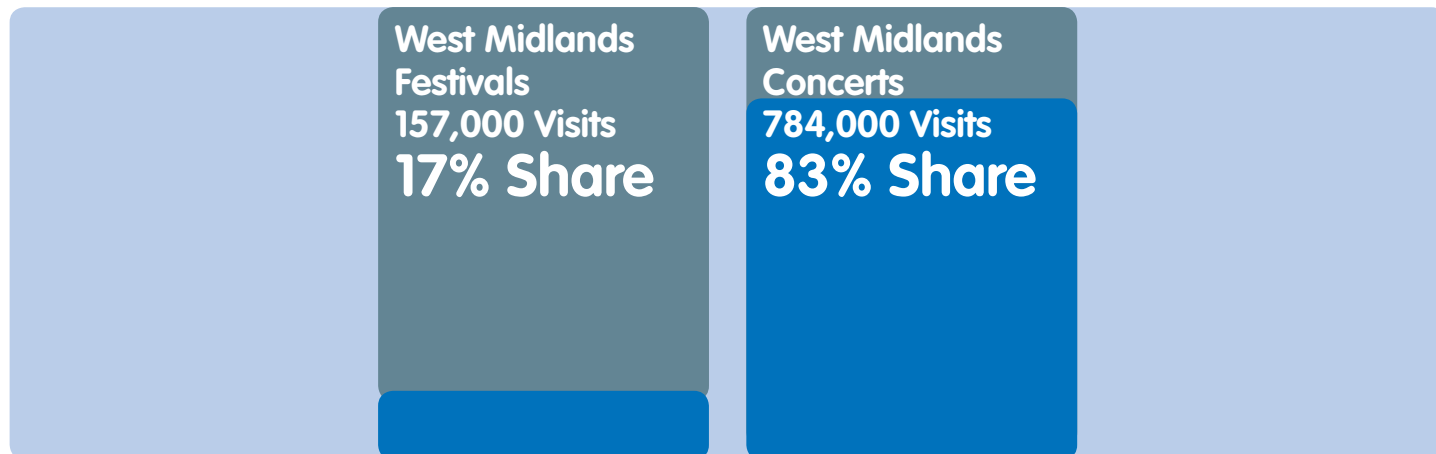
West Midlands Regional Attendances

On average, locals outnumber music tourists from outside the region at major music events in the West Midlands.



West Midlands Music Tourist Attendances: Festivals vs Concerts

Concerts account for **83%** of music tourism visits to the West Midlands.



West Midlands Music Tourist Spending: Festivals vs Concerts

While festivals in the West Midlands account for just **17%** of music tourist visits, they account for **35%** of music tourism spending.

West Midlands
Festivals
£48 Million
35% Share

West Midlands
Concerts
£90 Million
65% Share

West Midlands Music Tourist Attendances: Domestic vs Overseas

Domestic music tourists account for **96%** of all music tourism visits.

West Midlands
Domestic
908,000 Visits
96% Share

West Midlands
Overseas
34,000 Visits
4% Share

Mike Stephens

The Acoustic Festival of Britain

www.acousticfestival.co.uk

[Held in Staffordshire]

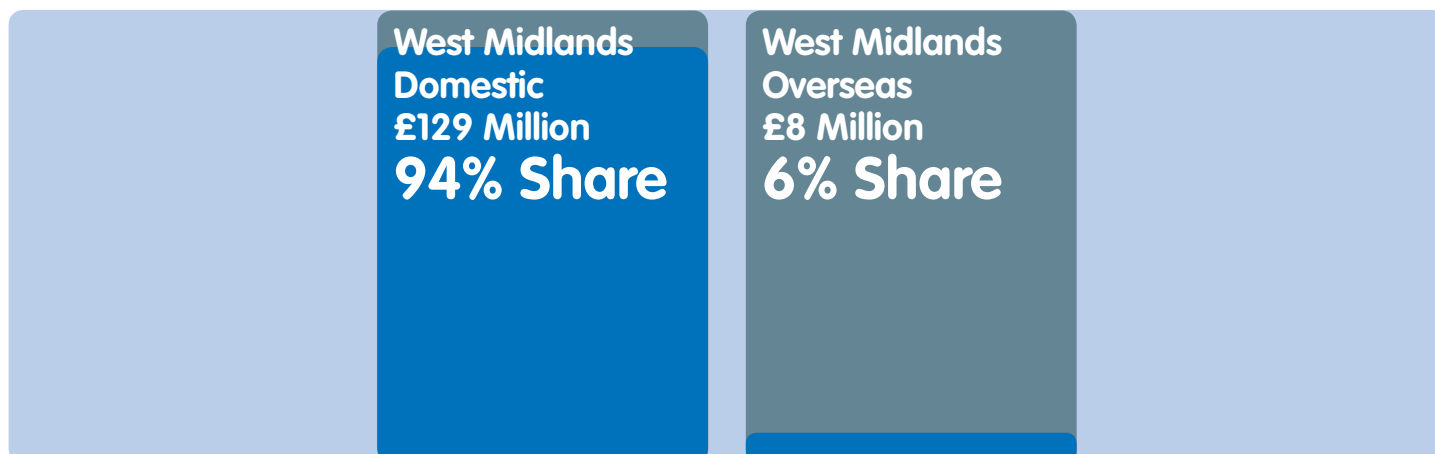
"Having been involved in the festivals of the UK since 1987 I have held over 145 outdoor music licenses. I have seen festivals grow and go bust. The most important thing of all events is the comfort and needs of the paying punter.

"I started the Acoustic Festival after seeing our Guilfest event grow a little too big for the relaxing atmosphere and customer comradeship we had in the first 8 years.

"We provide for customers who want the music as well as, nice flushing loos, being able to wash your hands in a sink and take a shower in the morning. The influx of people to Uttoxeter is 3,500 per day. All hotels are full, all B&Bs are full and the town comes alive."

West Midlands Music Tourist Spending: Domestic vs Overseas

Domestic music tourists account for **94%** of music tourism spending in the West Midlands.



In total, Music Tourists in the West Midlands spend at least **£138 million* a year**, benefitting the West Midlands economy by **£48 million a year in terms of GVA** and sustaining the equivalent of **1,202 full time jobs.**

NORTH EAST REGION

With a population of **2.5 million** – the least populated region in England – the North East plays host to the Evolution Weekender, INTRO and Split festivals amongst others, and is

home to the Metro Radio arena in Newcastle. The North East attracts **286,000** music tourist visits and accounts for **4%** of all music tourism visits to the UK.

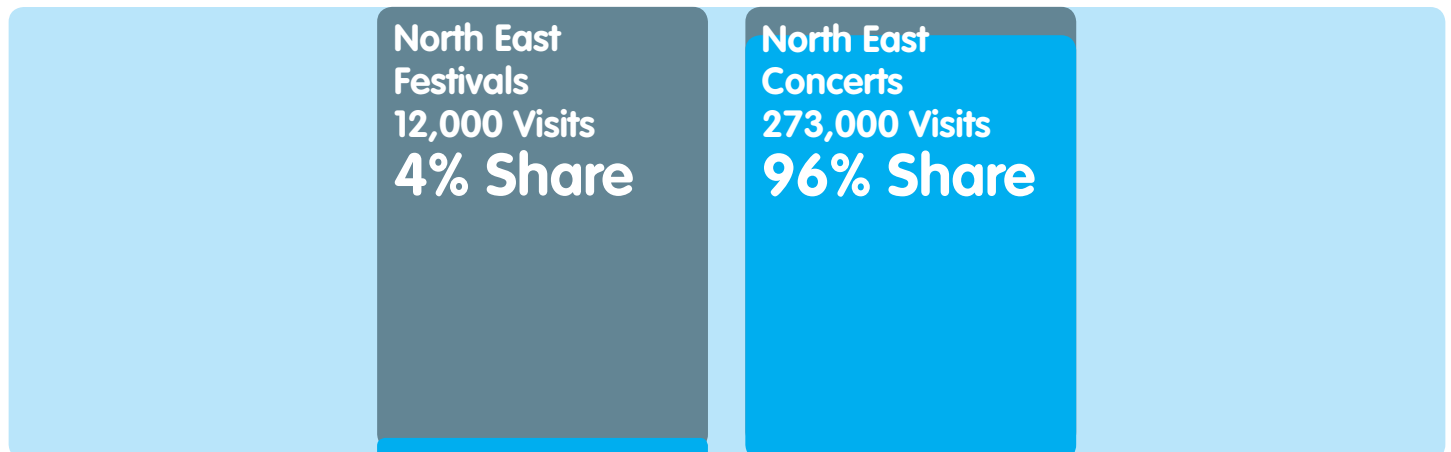
North East Regional Attendances

On average, local fans outnumber music tourists at major music events in the North East.



North East Music Tourist Attendances: Festivals vs Concerts

Concerts in the North East account for the lion's share of music tourism visits. The North East has more concerts relative to festivals than any other region or nation in the UK.



North East Music Tourist Spending: Festivals vs Concerts

Though festivals account for **4%** of music tourist visits, they account for **11%** of music tourism spending.

North East
Festivals
£4 Million
11% Share

North East
Concerts
£31 Million
89% Share

North East Music Tourist Attendances: Domestic vs Overseas

Domestic music tourists account for **98%** of all music tourism in the North East, a higher proportion than the UK average.

North East
Domestic
280,000 Visits
98% Share

North East
Overseas
6,000 Visits
2% Share

Justine Lester Co-Owner and Director Cloudhouses Ltd - Home of Yurts & Sqrts

www.yurtsandsqrts.com
[Based in Northumberland]

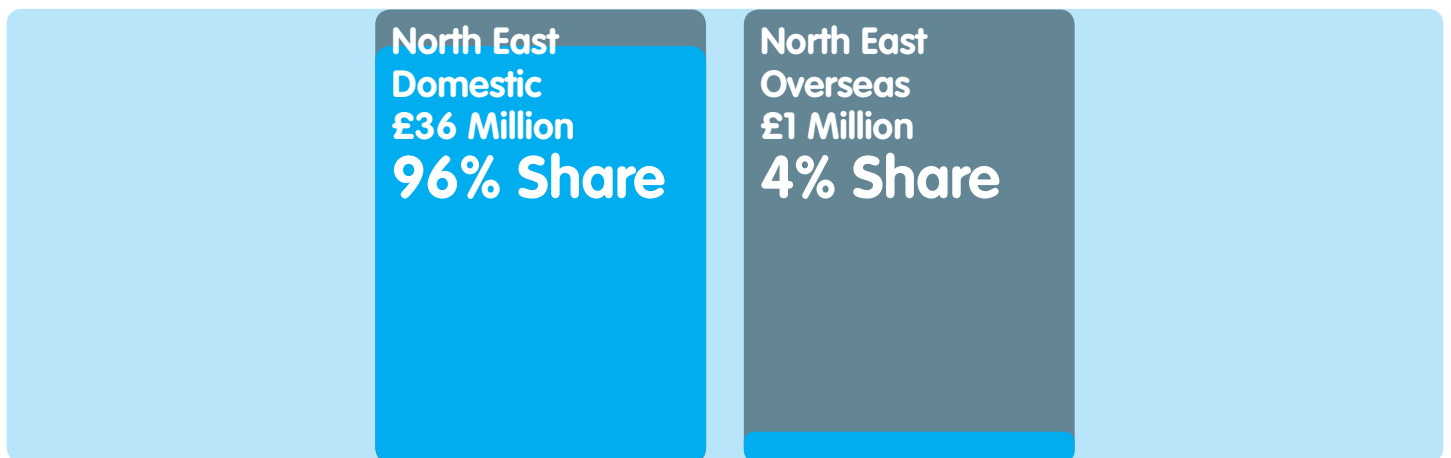
"Simon and I set up Yurts & Sqrts in 2007. Back then we had 8 sqrts; this year we will have over 80 structures.

"We have grown into a successful young business with a healthy turnover. We employ 2 people full time then we have part-time winter workers and up to 18 crew during the summer months. We hope to branch out into Europe one day, maybe even further afield.

"We depend on live music events for our living, our crew also rely on these events for their summer income. The live music industry brings so much tourism and spending to rural economies, it's very important for many people."

North East Music Tourist Spending: Domestic vs Overseas

Overseas music tourists account for just **2%** of visits to the North East, but **4%** of music tourist spending.



In total, Music Tourists in the North East spend at least **£35 million* a year**, benefitting the North East economy by **£8 million a year in terms of GVA** and sustaining the equivalent of **221 full time jobs.**

NORTH WEST REGION

With a population of **6.9 million**, the North West region is home to the MEN arena, the Bolton Arena, Manchester Central, and the Liverpool Echo Arena, while festivals include Liverpool Sound City, Mathew Street Festival, Africa Oye, In the City, Creamfields and Solfest to name but a few.

It also hosts a number of small but iconic music venues including the Cavern in Liverpool and Salford Lads Club.

The North West attracts **965,000** music tourist visits and accounts for **12%** of all music tourist visits to the UK. The North West is second only to London as a destination for music tourism. Internal industry data indicates that songwriter revenue from live music in the North West region increased by **50%** in the three years to 2009.*

* Will Page and Chris Carey (2010) 'Adding Up the UK Music Industry for 2009'; Available: www.prsformusic.com/economics

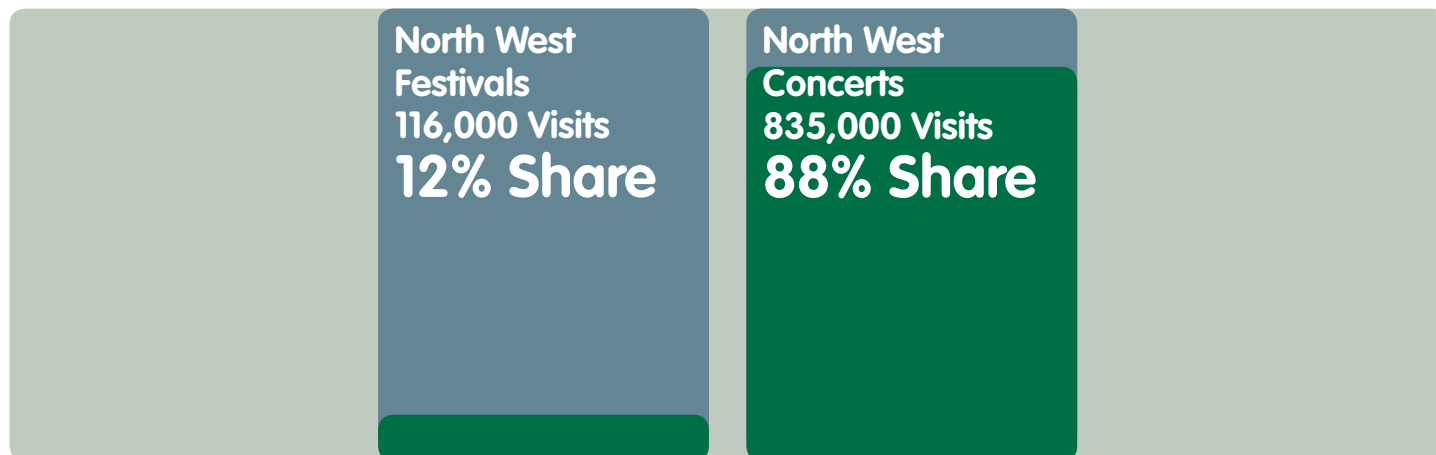
North West Regional Attendances

On average, local attendees outnumber out-of-region music tourists by a significant margin at major music events in the North West.



North West Music Tourist Attendances: Festivals vs Concerts

Concerts in the North West's vast array of venues account for **88%** of all music tourism visits to the region.



North West Music Tourist Spending: Festivals vs Concerts

While festivals draw **12%** of music tourism visits to the North West, they account for **27%** of music tourism spending in the region.

North West
Festivals
£35 Million
27% Share

North West
Concerts
£96 Million
73% Share

North West Music Tourist Attendances: Domestic vs Overseas

Domestic music tourists account for **96%** of all music tourists and **93%** of all music tourism spending.

North West
Domestic
922,000 Visits
96% Share

North West
Overseas
43,000 Visits
4% Share

Dave Pichilingi Founder Liverpool Sound City

www.liverpoolsoundcity.co.uk

"Liverpool Sound City attracts visitors from 23 different countries from Japan to Canada and Australia to Spain. The annual music festival has generated more than £12 million additional income for digital and music businesses and young entrepreneurs in the Liverpool and North West region.

"We have the reputation, the history, the credibility and the infrastructure. Quite simply we lead the way for the UK in terms of architecture and popular culture. The Liverpool music scene is the bedrock of all of this."

Kevin McManus Head of Sector Development Creative Industries & Digital Liverpool Vision

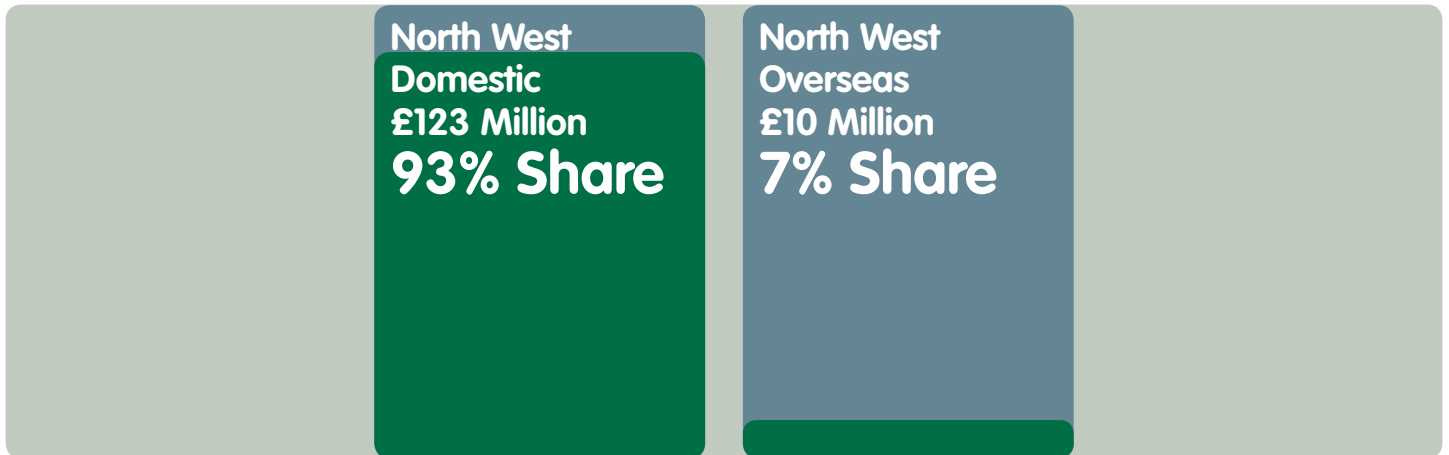
www.liverpoolvision.co.uk

"In 2008 Liverpool was European Capital of Culture which really put us back on the map.

"The knock-on effect of music tourism in Liverpool has been huge. The value to local hotels, bars, restaurants and taxis is huge. Liverpool tourism is worth an annual £13 million per year in economic benefit and supports 23,000 jobs."

North West Music Tourist Spending: Domestic vs Overseas

Overseas music tourists account for **4%** of all music tourist visits and **7%** of music tourism spending in the North West. This mirrors the UK proportions as a whole.



In total, Music Tourists in the North West spend at least **£132 million* a year**, benefitting the North West economy by **£56 million a year in terms of GVA** and sustaining the equivalent of **1,400 full time jobs.**

Leslie Holmes **Project Manager** **Salford Lads Club**

www.salfordladsclub.org.uk

"The Smiths room is now a major attraction for visitors, most of whom are music fans. We have lots of touring bands, mainly American, who come three or four times a year. They put it on their website and it spreads the message. We feature in quite a lot of guide books.

This has been spread by music fans as we don't have any marketing budget!

"If there are big events in Manchester, our numbers increase significantly. We've had visitors from Europe, Scandinavia, Russia, Australia, New Zealand, America, Canada and Chile. Many of them have not been to Manchester

Emails from visitors to the Salford Lads Club:

BRAZIL

Hi folks, My name is Sérgio and I live in Brazil. Me and my wife were in Manchester because our honeymoon. So, we send to you our picture in front of Salford Lads Club and we would like you put it in Smiths room.
Best regards, Family C

FINLAND

Hello! We visited your wonderful club July 21st this year. Thank you again for the great tour!
Best wishes, Pirjo

NORWAY

Dear Leslie Holmes
I just want to thank you for the guided tour at Salford Lads Club. We found it impressive to see how much work volunteers are putting down for the club, and how important the club must be for many of the kids in the area. It surely was one of the highlights on our visit to Manchester. If you or any of your mates at Salford Lads Club should ever go to Norway you are of course more than welcome to contact a guided tour at our museum.
Cheers and regards from

Dag Ingemar Børresen and the rest of the gang at the Whaling Museum in Sandefjord, Norway.

UNITED STATES

Hello,
My husband and I finally made the trip from Los Angeles to the mecca for Smiths fans, the Salford Lads Club. We took our picture in front of the building. We were escorted by a very nice man - his kindness made our trip to the Salford Lads Club very memorable. Thank you again, Cesar and Adriana
Los Angeles, Cal., USA

Craig Gill **Manchester Music Tours** **(former member of the band Inspiral Carpets)**

www.manchestermusictours.com

"People from all over the world are interested in the Manchester music scene. The further away they live the more intrigued they are.

"The most popular attractions on the Music Tour are the Salford Lads Club, Siffers Record Store (Oasis) the Ian Curtis Memorial Bridge (Joy Division), Factory Records HQ and The Free Trade Hall (great natural history attached to this also).

"The knock-on effect of Manchester music scene tourism is massive. We are behind Liverpool and London in that sense but even John Lydon commented recently on his tour of London that 'Manchester is much more pretty.'"

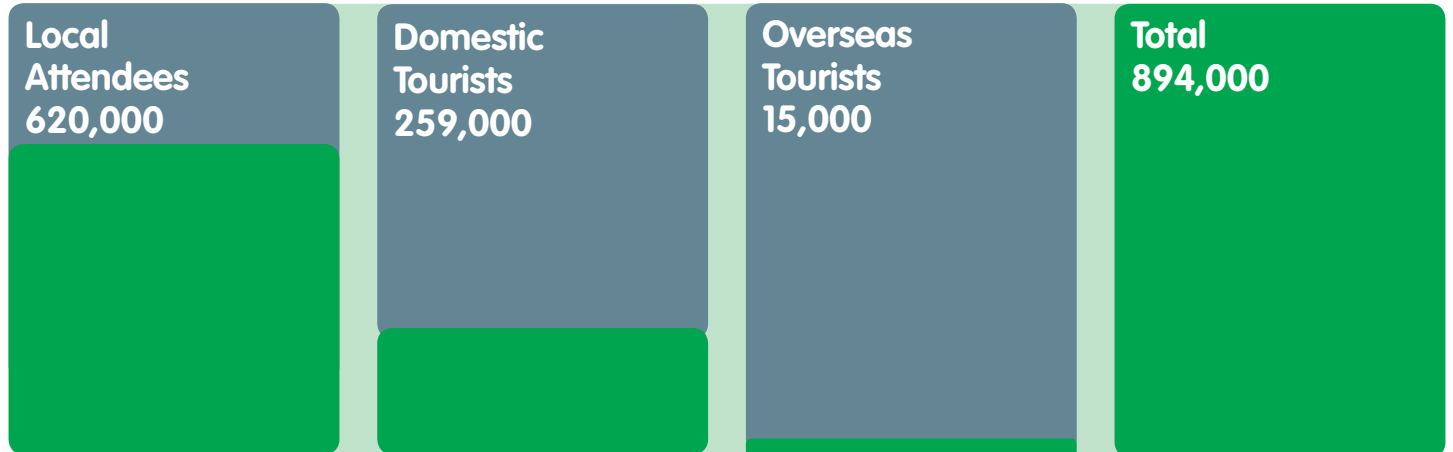
YORKSHIRE & HUMBERSIDE REGION

With a population of **5.2 million**, the Yorkshire and Humber region is host to the Leeds festival and the Huddersfield Contemporary Music Festival amongst others, and is home to

the Don Valley Stadium and the Motorpoint Arena Sheffield. Yorkshire and Humberside attract **274,000** music tourist visits and accounts for **4%** of all music tourist visits to the UK.

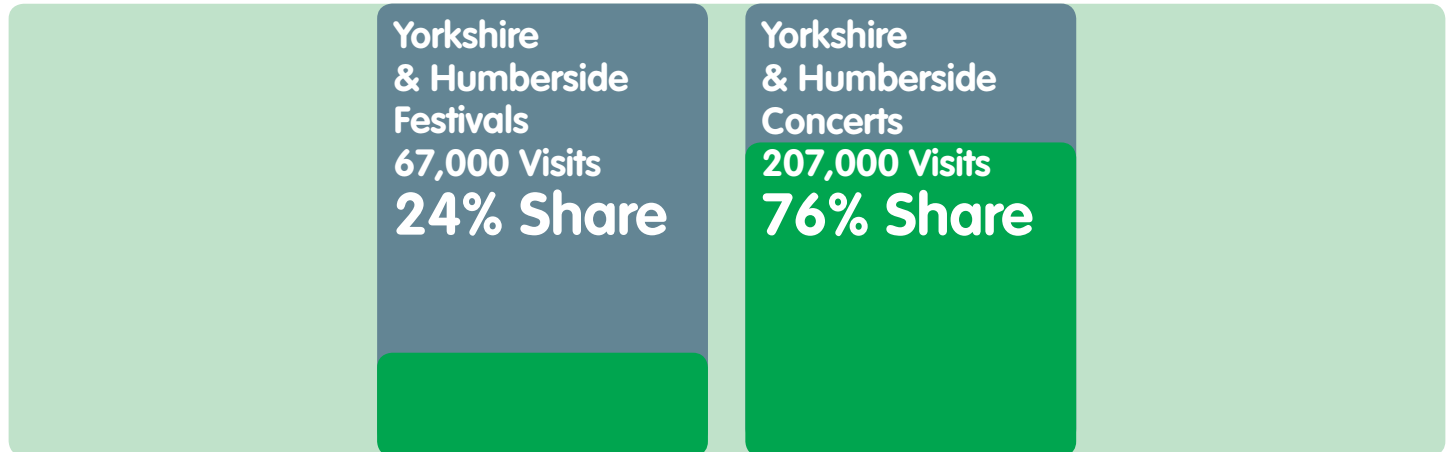
Yorkshire & Humberside Regional Attendances

Local fans outnumber out-of-region music tourists at major music events in the Yorkshire and Humberside region by more than 2 to 1.



Yorkshire & Humberside Music Tourist Attendances: Festivals vs Concerts

Three-quarters of all music tourist visits to Yorkshire & Humberside are to attend a concert.



Yorkshire & Humberside Music Tourist Spending: Festivals vs Concerts

Though festivals account for less than a quarter of music tourist visits, they account for **46%** of music tourism spending in the region.

Yorkshire
& Humberside
Festivals
£21 Million
46% Share

Yorkshire
& Humberside
Concerts
£24 Million
54% Share

Yorkshire & Humberside Music Tourist Attendances: Domestic vs Overseas

The Yorkshire and Humber region attract a slightly higher proportion of overseas visitors than the UK average.

Yorkshire
& Humberside
Domestic
259,000 Visits
94% Share

Yorkshire
& Humberside
Overseas
15,000 Visits
6% Share

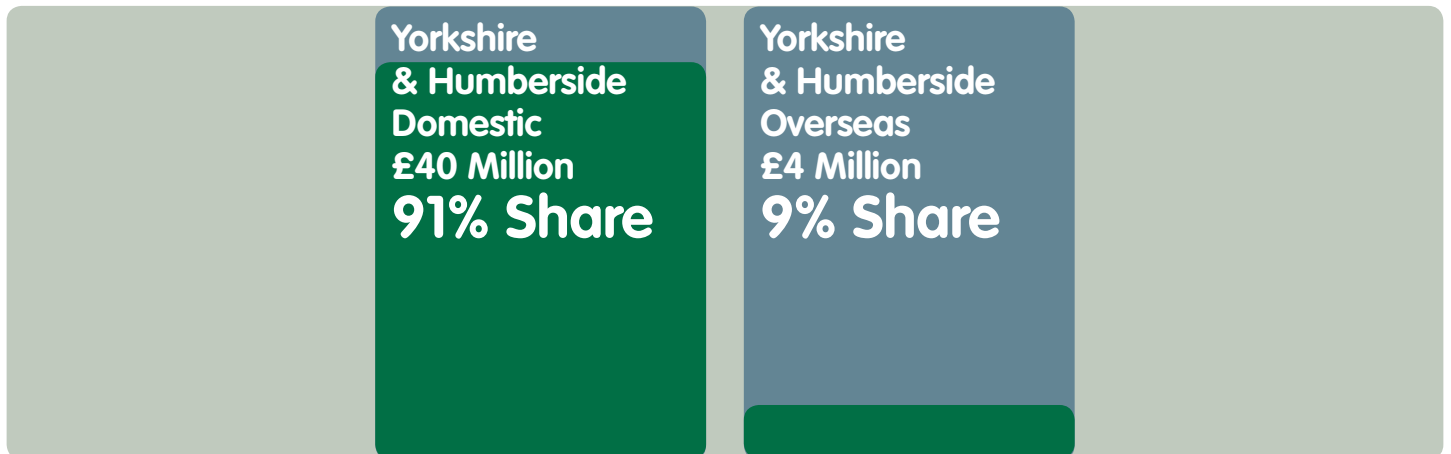
Helen Smith
Revenue Manager
Jurys Inn
Leeds Hotel

www.leedshotels.jurysinns.com

"Over the Leeds Festival period we are fully booked on the Friday and Saturday nights. Our hotel is a popular choice for festival-goers as we are located close to the festival site with a shuttle bus that takes fans straight there. The Leeds Festival is a good thing for our business with the tourism the live music event attracts."

Yorkshire & Humberside Music Tourist Spending: Domestic vs Overseas

Domestic music tourists account for **91%** of all music tourism spending in the region.



In total, Music Tourists in Yorkshire & Humberside spend at least **£45 million* a year**, benefitting the Yorkshire & Humberside economy by **£15 million a year in terms of GVA** and sustaining the equivalent of **380 full time jobs.**

Matt Cheshire
Managing Director
Artist Needs Ltd

www.theneedsgroup.com
[Based in Leeds]

"10 years ago I was asked to assist with a show in Leeds that needed a small team of people with technical music knowledge. I took the opportunity and since then, over the last 10 years, we have been part of many different music shows - The Leeds Love Parade, Gatecrasher and Liverpool Capital of Culture. In the summer months I have over 80 people working on festivals all over Europe."

NORTHERN IRELAND

With a population of just **1.7 million**, Northern Ireland is host to Belsonic, the Open House Festival, Glasgowbury and the Belfast-Nashville Songwriters Festival amongst others, and

boasts the King's Hall, Waterfront and Odyssey Arenas. Northern Ireland attracts **166,000** music tourist visits and accounts for **2%** of all music tourism visits to the UK.

For Northern Ireland, a domestic tourist is defined as someone who booked a ticket to the live music event in advance, and who travelled to Northern Ireland from elsewhere in the UK.

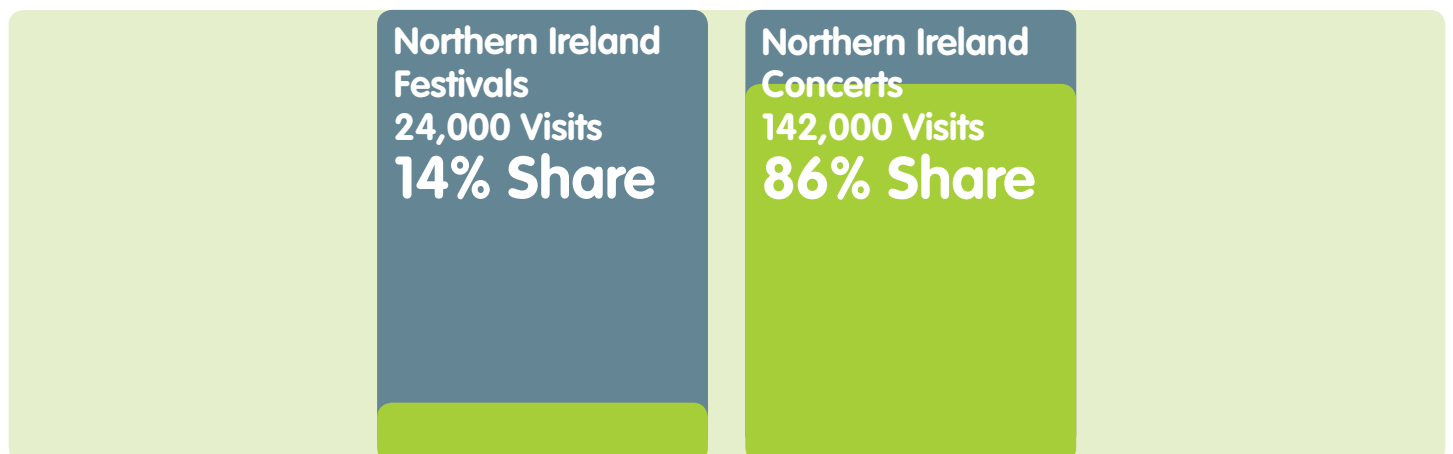
Northern Ireland Regional Attendances

On average, there are nearly four times as many 'local' fans at large music events in Northern Ireland than music tourists.



Northern Ireland Music Tourist Attendances: Festivals vs Concerts

Concerts account for **86%** of music tourists to Northern Ireland, while festivals accounted for the remaining **14%**.



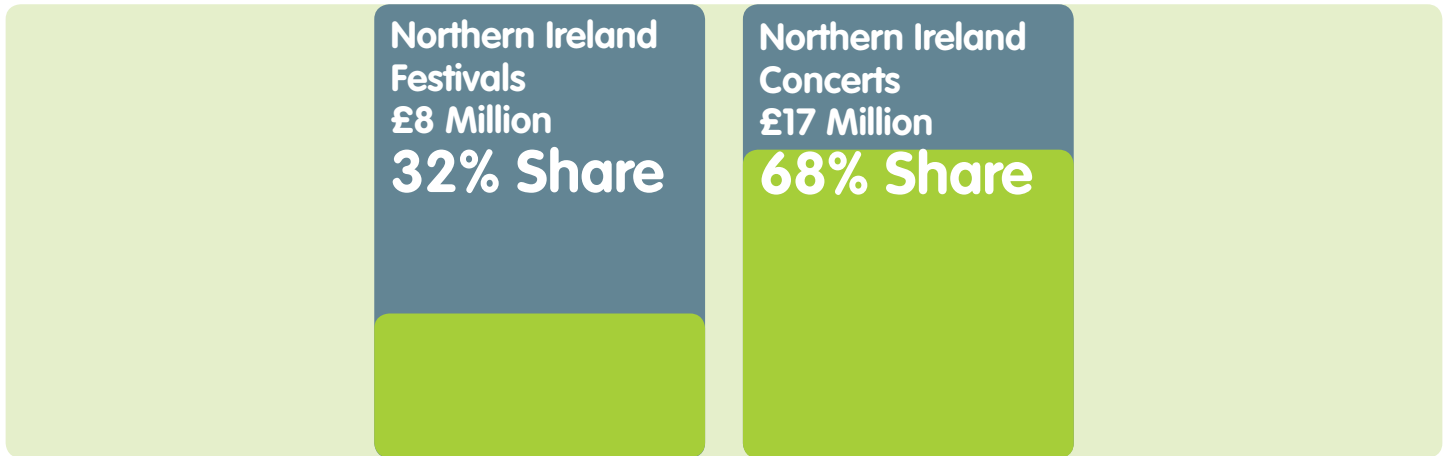
Fiona Ure
Communications Executive
The Belfast Visitor & Convention Bureau

www.gotobelfast.com

"The potential for music related tourism is huge as Belfast continues to attract a combination of niche music events and big headline acts. Belfast has always produced great musical talent from Van Morrison to James Galway and more recently Snow Patrol, who hail from Bangor on Belfast Lough's southern shores."

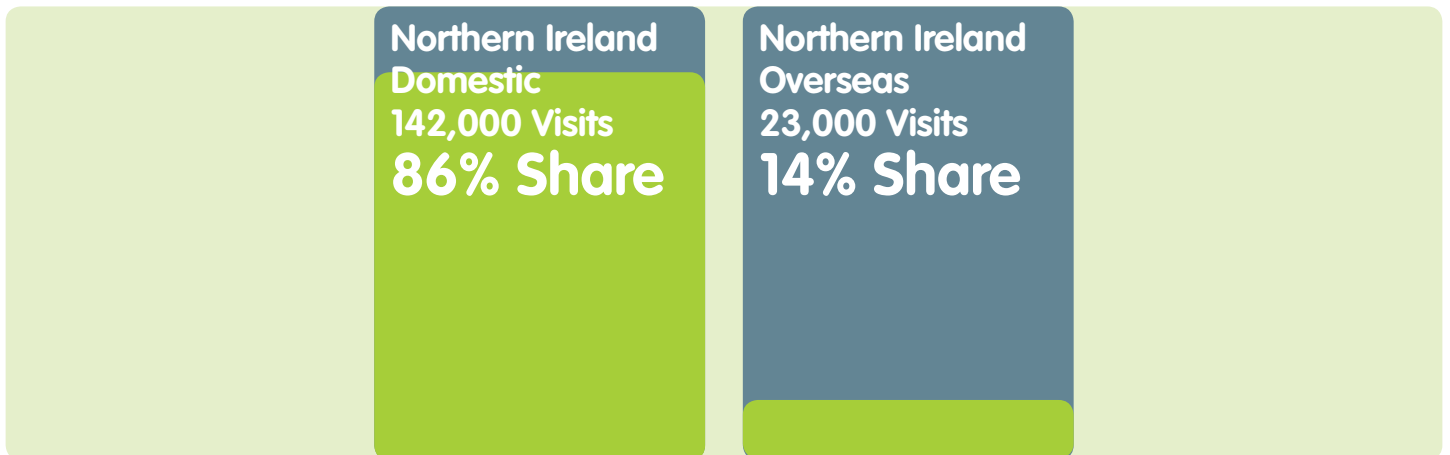
Northern Ireland Music Tourist Spending: Festivals vs Concerts

Though festivals account for just **14%** of music tourist visits to Northern Ireland, they account for **32%** of spending.



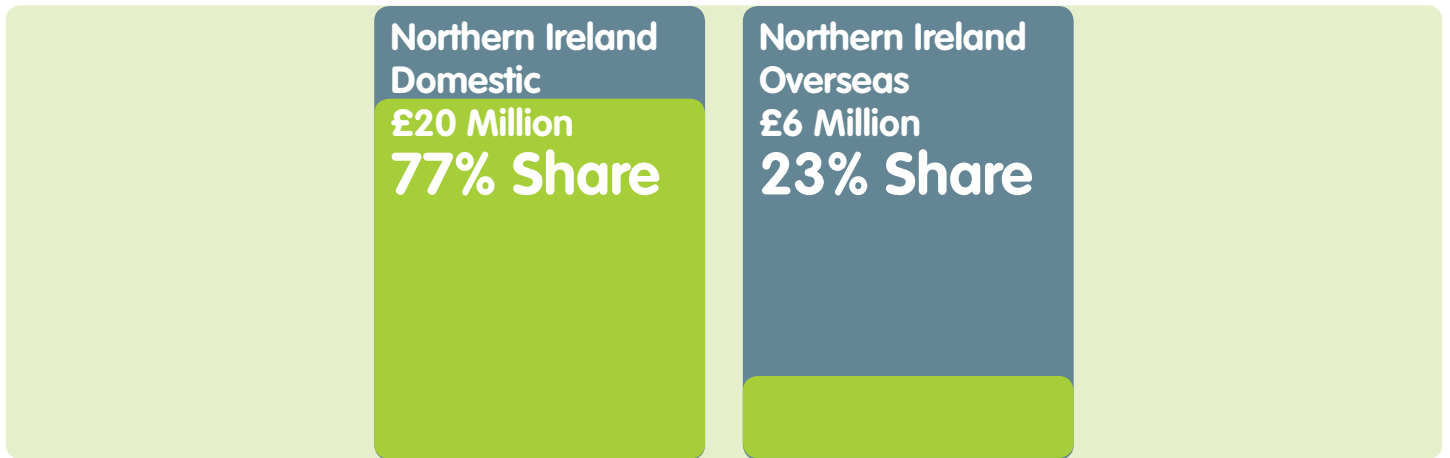
Northern Ireland Music Tourist Attendances: Domestic vs Overseas

Northern Ireland attracts a much greater proportion of overseas music tourists than any other nation or region apart from Scotland. Overseas music tourists comprised **14%** of all music tourist visits, compared to a UK average of **5%**.



Northern Ireland Music Tourist Spending: Domestic vs Overseas

Overseas tourists account for **23%** of all music tourism spending in Northern Ireland. Spending by overseas tourists as a proportion of all tourism spending is higher in Northern Ireland than in any other nation or region of the UK.



In total, Music Tourists in Northern Ireland spend at least **£25 million* a year**, benefitting the Northern Ireland economy by **£8 million a year in terms of GVA** and sustaining the equivalent of **205 full time jobs.**

Stuart Bailie, CEO Oh Yeah Music Centre, Belfast

www.ohyeahbelfast.com

"These are exciting times for Belfast. Venues are busy and the new bands are sustaining the energy levels. The largest outdoor music event in Northern Ireland took place on June 5, 2010. Snow Patrol from Bangor, performed at Ward Park their home town to over 41,000 people and a significant number of those were visitors."

Gary Lightbody (Snow Patrol), September 2010

"The scene at the moment is incredible. There's gigs every night; great bands like Two Door Cinema Club, And So I Watch You From Afar and Lafaro; great labels; and great places to rehearse – the Oh Yeah Centre is flourishing....When the spotlight is thrown on Belfast, people see just how robust and vibrant the scene is at the moment. Long may it last."

Nanci Griffith Nashville

www.belfastnashville.com

"The Song Writers' festival in Belfast has become my annual vacation. It's an extraordinary event."

Carolyn Mathers Tourism Culture and Arts Belfast City Council

"Our new initiatives such as the Belfast Music Exhibition, Belfast Music iPhone app, Belfastmusic.org and the Belfast Music Coach Tour promote Belfast's reputation as the birthplace of exceptional music. During Belfast Music Week we worked with a wide range of venues and promoters to market over 100 live music events in 8 days. The purpose was to showcase and strengthen Belfast's position on the world stage as a music destination and to increase the number of musicians doing business internationally. Belfast Music Week generated income of £1,185,000 for Belfast and positive national media coverage equated to 1,555,960 in advertising spend."

Lord Mayor of Belfast, Councillor Pat Convery:

"Belfast's music receives high international praise. Our latest generation of musicians are playing a crucial role in revitalising the city which is lit up with a vibrant calendar of music festivals. This art form is defining the new mood of Belfast. The fact that MTV's Europe Music Awards will be held in Belfast in 2011 is a significant endorsement of our music current scene."

The Open House Festival

www.openhousefestival.com

"From everyone here at the Coors Light Open House Festival HQ - a huge thank you to the 20,000 people who made the effort and journey to come to the 2010 festival - some from as far afield as Chile, Argentina, Australia, Spain and France, never mind the thousands from all over Ireland and the UK.

"It was our biggest and best festival ever and it was our audience, volunteers, crew, staff, sponsors, supporters and of course artists that made it possible. Without you we'd be lost souls wailing in a hopeless gloom. Thank you, thank you, thank you!"

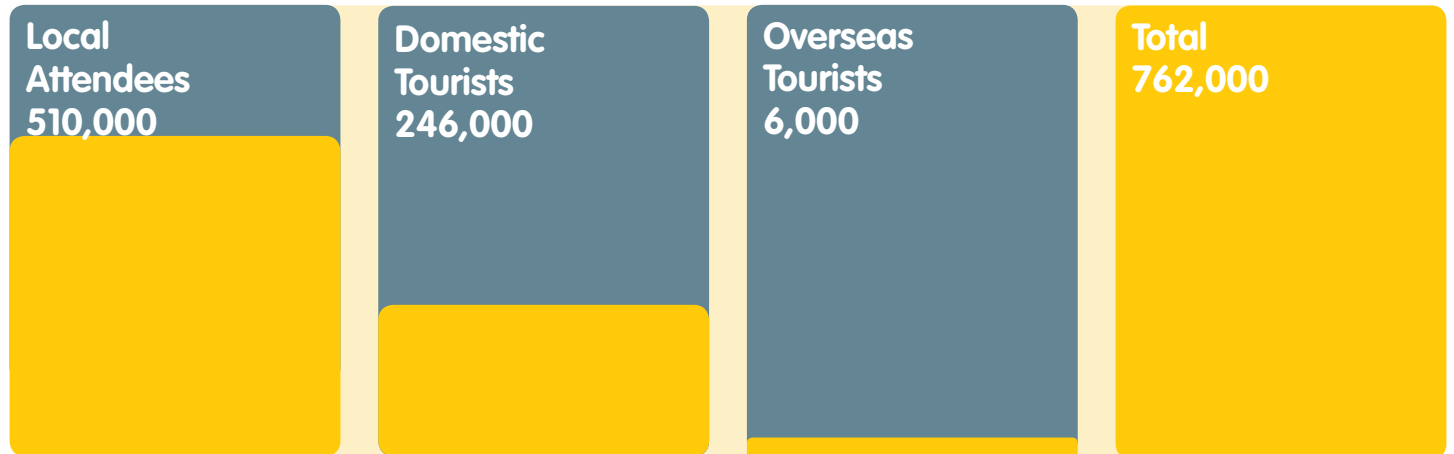
WALES

With a population of **3 million**, Wales is host to the Green Man, Pontardawe, Hammerfest, Bloom Festival and The Escape into the Park dance festival and the Cardiff International Arena

amongst others. Wales attracted **252,000** music tourist visits and accounts for **3%** of all music tourism visits in the UK.

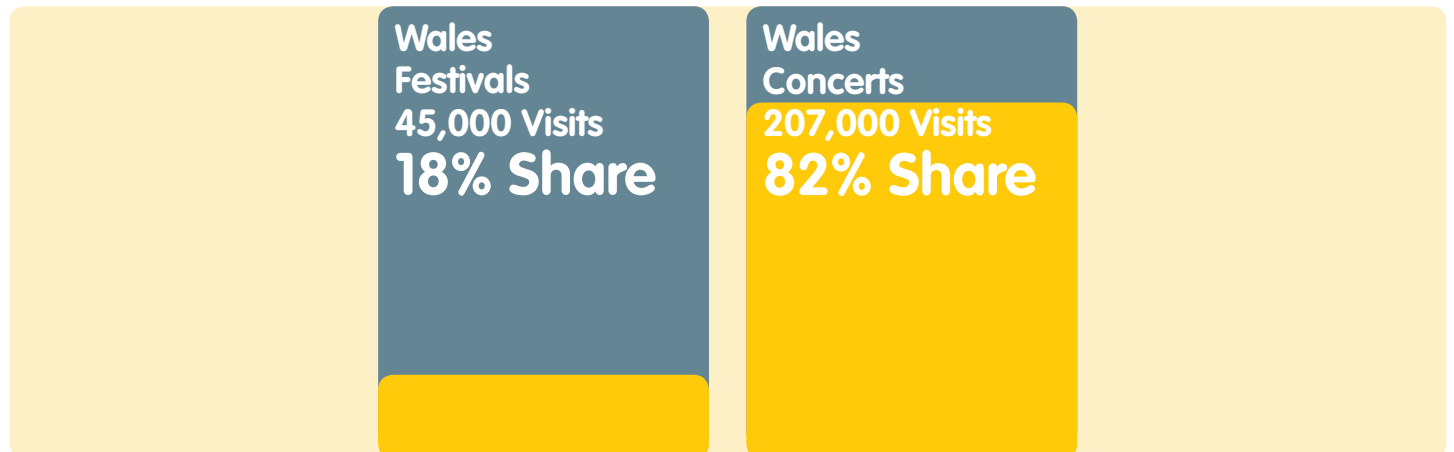
Wales Regional Attendances

On average, local fans outnumber music tourists by a ratio of 2 to 1 at large music events in Wales.



Wales Music Tourist Attendances: Festivals vs Concerts

Concerts and gigs attract **82%** of music tourists to Wales, while music festivals draw in the remaining **18%**.



Wales Music Tourist Spending: Festivals vs Concerts

Festivals draw in **18%** of music tourists to Wales, but festivals account for **37%** of all music tourism spending in Wales.

Wales
Festivals
£14 Million
37% Share

Wales
Concerts
£23 Million
63% Share

Wales Music Tourist Attendances: Domestic vs Overseas

Domestic music tourists comprise **98%** of all music tourists who visit Wales, a slightly higher proportion of domestic tourists than for the UK as a whole.

Wales
Domestic
246,000 Visits
98% Share

Wales
Overseas
6,000 Visits
2% Share

Ieuan Wyn Jones

Former Deputy First Minister
for Wales Welsh Assembly
Government

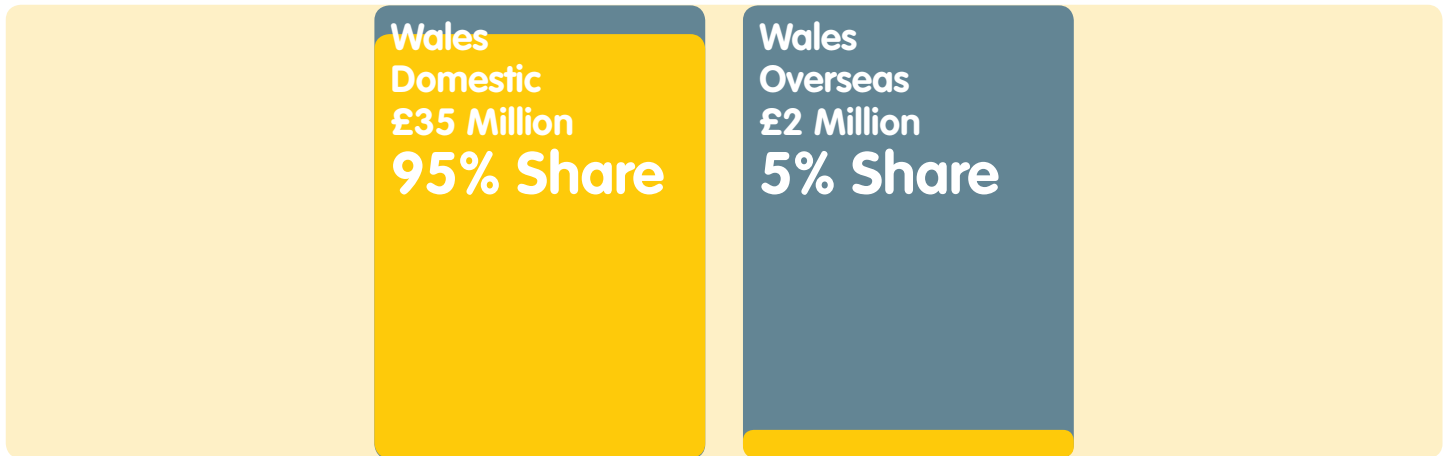
www.wales.gov.uk

"The Welsh Assembly Government recognises music as a precious art in its own right – and we also recognise the tremendous contribution it makes to our creative economy in Wales, running like a golden thread through our broadcasting and film industries.

"The economic benefits from music are clear. The UK music industry is worth close on £4 billion – in fact recent figures show it's bucked the trend in other industries, growing by an annual 5% during 2009. And the growth of live music revenues was sharper still, increasing 9.4% over the same period. We are in no doubt that this sector is one with great growth potential and we aim to continue our support, now and in the future years."

Wales Music Tourist Spending: Domestic vs Overseas

Overseas visitors comprise just **2%** of all music tourists who visit Wales, but **5%** of all music tourism spending.



In total, Music Tourists in Wales spend at least **£37 million* a year**, benefitting the Welsh economy by **£21 million a year in terms of GVA** and sustaining the equivalent of **555 full time jobs**.

SCOTLAND

With a population of **5.1 million**, Scotland hosts T in the Park, Rockness, Celtic Connection, the Rewind and Wickerman festivals, and is home to the SECC Glasgow, AECC Aberdeen, IEC Edinburgh and Braehead Arena amongst others. Hampden Park is also used for music concerts. Scotland

attracts **188,000** music tourist visits and accounts for **2%** of total music tourism in the UK. Internal industry data indicates that Scotland is amongst the top three growth areas for live music songwriter revenues in the UK.*

* Will Page and Chris Carey (2010) 'Adding Up the UK Music Industry for 2009'; Available: www.prsformusic.com/economics

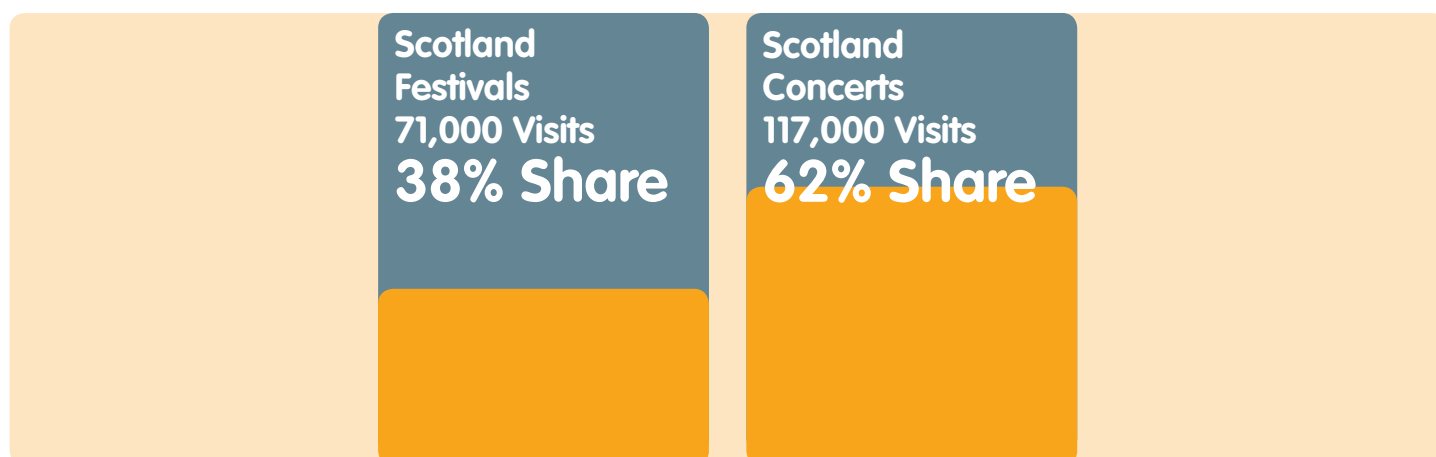
Scotland Regional Attendances

Scotland is host to a large number of major music events, although a relatively small proportion of attendees are from outside Scotland. The ratio of Scottish resident music fans to music tourists is higher in Scotland than in any other nation or region of the UK.



Scotland Music Tourist Attendances: Festivals vs Concerts

Concerts draw in **62%** of music tourists while festivals draw in **38%**.



Richard Pinn

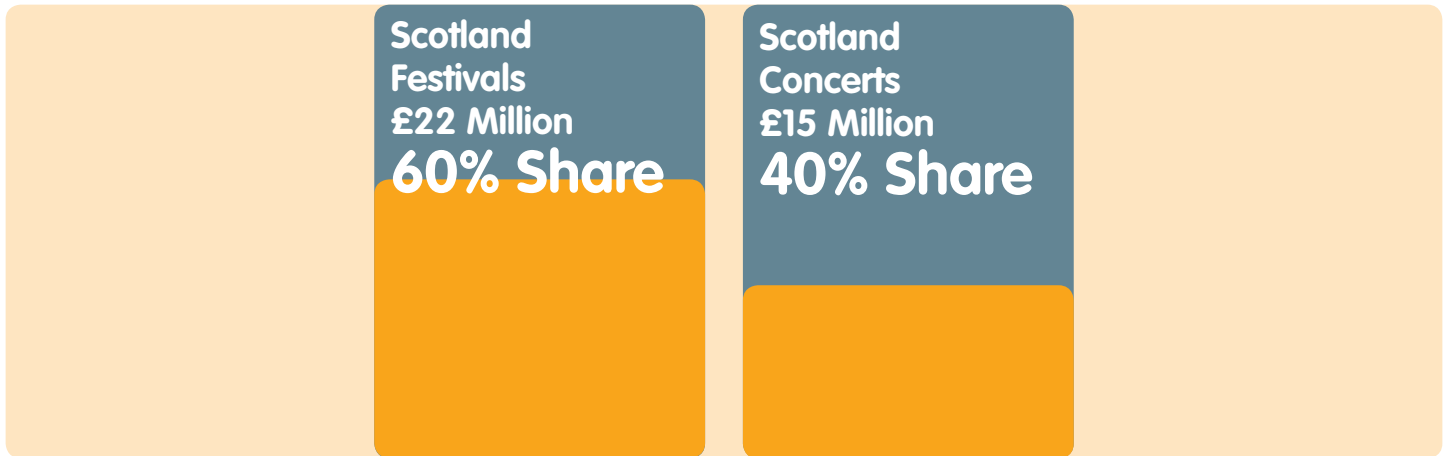
Regional Director for Perth and Kinross, VisitScotland

www.visitscotland.org

"Events and festivals are an increasingly important draw for visitors and our UK consumer research indicates 40%, of those questioned, take in an event or festival during a short break. T in the Park is an excellent opportunity to showcase the beautiful setting of Perthshire and also to encourage festival goers to visit the region again in the future and even stimulate trips to other parts of the country."

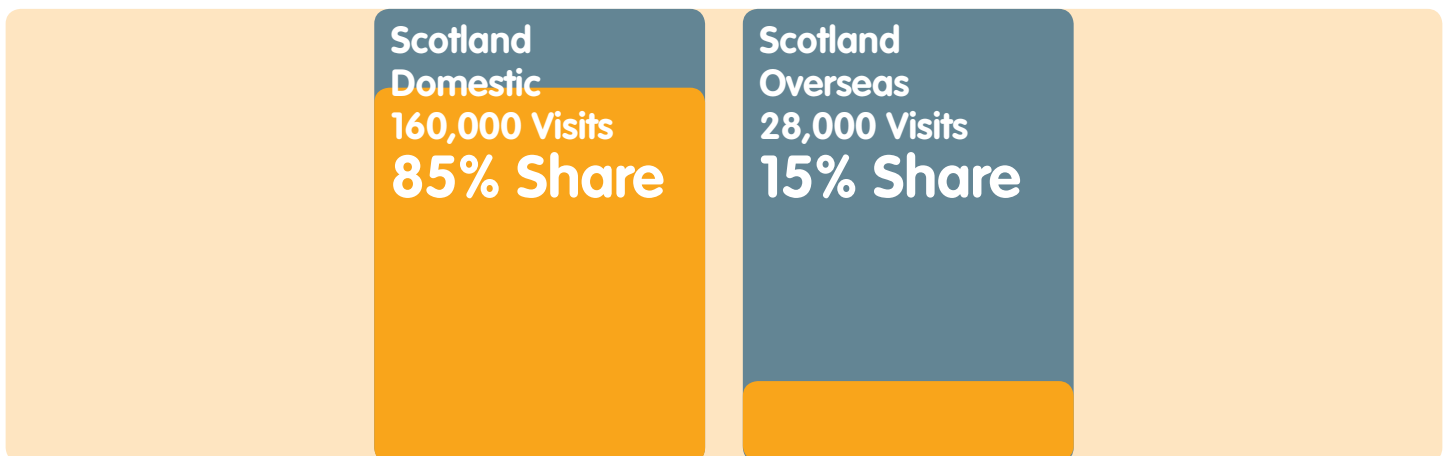
Scotland Music Tourist Spending: Festivals vs Concerts

Festivals account for **60%** of music tourism spending while concerts account for **40%**, as festival goers spend more on average than concert goers.



Scotland Music Tourist Attendances: Domestic vs Overseas

Overseas visitors account for an impressive **15%** of all music tourists to Scotland. Scotland has the highest share of overseas tourists relative to domestic tourists of all nations and regions in the UK. In absolute numbers, Scotland attracts more overseas tourists than every other nation and region apart from London, the North West and the West Midlands.



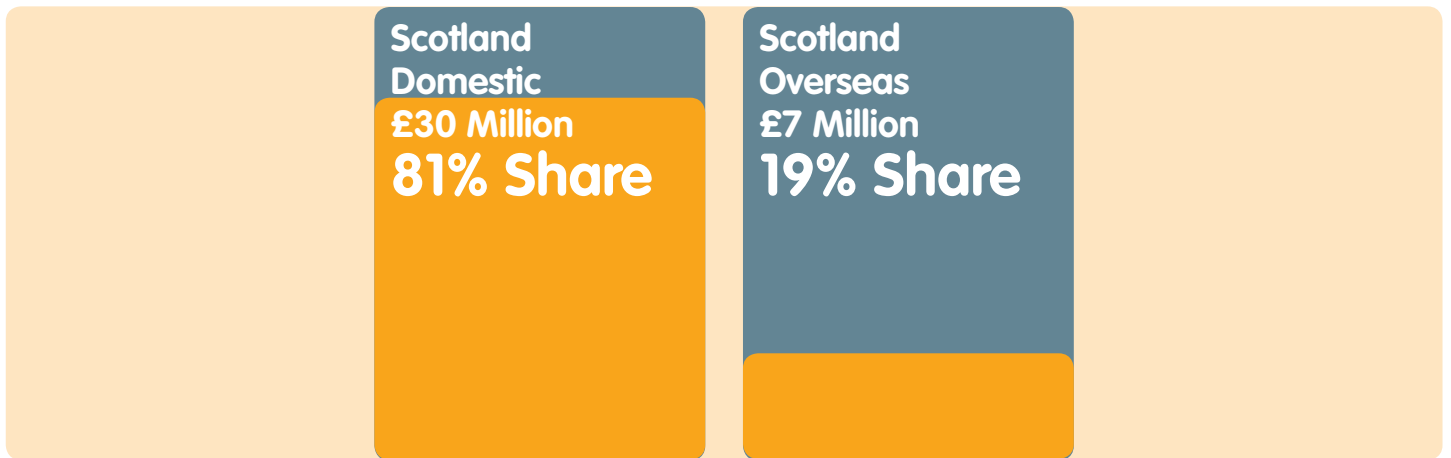
Vicki Unite Chief Executive Perthshire Chamber of Commerce

"T in the Park attracts a crowd of over 80,000 every summer. Many of those attending are visitors from outside Perthshire. Accommodation suppliers are full for the duration

of the event. Other local suppliers see a boost to trade during T in the Park - shops, restaurants and petrol stations. Even those seeing the area through media coverage may be tempted to visit Perthshire."

Scotland Music Tourist Spending: Domestic vs Overseas

Spending by overseas music tourists accounts for almost a fifth of all music tourism spending in Scotland, a significantly higher proportion than in any English region.



In total, Music Tourists in Scotland spend at least **£37 million* a year**, benefitting the Scottish economy by **£17 million a year in terms of GVA** and sustaining the equivalent of **405 full time jobs**.

Councillor Ian Miller Leader Perth & Kinross Council

"T in the Park generates in excess of £7 million p/a for the local economy of Perth and Kinross. The equivalent of £10.7 million is generated through media coverage which is likely to benefit the local tourism industry.

"During the festival there is a major influx of

people into the area. The Balado site becomes the fifth largest population centre in Scotland for the weekend of the event. Hotel rooms are booked solid in Perth, Kinross and the surrounding areas, and local shops see a huge boost in business through the sales of camping equipment, clothes, food and drink. Taxi and bus companies from Kinross up to Perth also do a roaring trade."

This study establishes the positive & significant contribution that live music makes to the tourism economy in the UK as a whole and in the nations and regions.

Live music has experienced almost a decade of strong growth.

Revenues from live music grew by over 9% in 2009, following on from growth of 13% in 2008.

The appetite for music produced in the UK is very high in other parts of the world. As part of this study, we looked at 35 of the largest music festivals across 20 nations outside of the UK and found that a UK act featured as a headline in 89% of them. On average, UK bands comprised 28% of the total festival line-ups in those countries. The appeal of UK artists to live music enthusiasts around the world seems incontrovertible.

According to the annual Nation Brand Index survey, which is based on interviews with 20,000 people worldwide, the UK is ranked fourth in the world for being an "interesting and exciting place for contemporary culture such as music, films, art and literature."

This suggests that the UK is sitting on a national asset of immense value.

But the growth of music generated tourism in the future is not assured. The National Arenas Association recently reported a significant fall in attendances at music arena shows in 2010.

No one organisation has strategic oversight for music-driven tourism. Music tourism is not currently a defined segment within the tourism industry. As we found, there is no easy way of measuring the size or significance of music tourism. The United Nations World Tourism Organisation does not offer any criteria for what does and what does not constitute a 'music tourist'. And with a few notable exceptions, the music industry does not have a strong history of working with formal tourism bodies.

UK Music strongly recommends that a national strategy is required to unleash the full potential of live music to contribute to the UK's tourism economy. Our aim should be that music fans the world over choose the UK as the most favoured destination for live music events and music attractions.

Lucy Hooper
28
Tasmania Australia
Currently living in London

"I would definitely think of a UK music festival as a holiday. I have travelled around Europe for music festivals too, having been to Roskilde in Denmark, Rock Werchter in Belgium, Benicassim in Spain and Sziget in Hungary. The money I spend at festivals goes on transport, drinks and food. I have also bought clothing specifically for a festival."

"THE MONEY I SPEND AT FESTIVALS GOES ON TRANSPORT, DRINKS AND FOOD."

UK MUSIC RECOMMENDATIONS:

- Clearly, we must do more to attract greater numbers of overseas music tourists – they spend a quarter more in the UK than the ‘average’ overseas visitor, and constitute 18% of music tourism spending even though they only account for 5% of the music tourist population.

- The Government’s new tourism policy allows for the creation of ‘thematic’ tourism bodies based around a particular type of holiday (caravanning, boating or walking). This should pave the way for the creation of the first ever “live music tourism body” to promote music tourism within the UK.

- Tourism authorities and local economic partnerships should capitalise on the unique musical strength and heritage of each region and nation with specific campaigns and packages including transportation and accommodation.

- A comprehensive ‘music tourism map app’ should be designed which can help potential tourists design their own musical tour to cater for every musical taste, incorporating iconic places, histories, and opportunities to attend live music events.

- Central Government should address concerns over the difficulties that overseas performers encounter with the UK’s visa system, and work with their counterparts in other countries to ease difficulties that UK performers encounter when seeking entry to other countries to tour & perform.

- Central Government should work with the music industry to ensure that fans have an industry-approved facility to trade and sell on any tickets to live music events which are surplus to their requirements.

- The success of the “top end” live music scene owes much to the health of the grassroots and intermediary music scene. Central Government should encourage live music at the grass roots by exempting small venues from the licensing regulations in the 2003 Licensing Act.

- Regional and city planning authorities should ensure a balanced mix of small, medium and large capacity venues in each region or major city for a seamless progression route for musicians as their musical careers advance.

- In recognition that this study, though the most comprehensive ever undertaken, only captures a proportion of the music events that take place in the UK, we recommend further research on the value of music to the tourism economy. As well as incorporating data from smaller capacity music events, it could analyse the significance of music attractions in drawing tourists, other live events where music is a significant element, such as opera, musicals, and street carnivals, and crucially, track trends to see whether music tourism in the UK is growing.

UK Music stands ready and willing to contribute to this effort.

Recent Music Tourism Campaigns

VisitBritain partnership with EMI

As part of their marketing strategy, VisitBritain have used links with UK music labels and artists to provide content for campaigns in both established and emerging markets. VisitBritain established a partnership with EMI Music in 2007 in order to highlight Britain's rock and pop music heritage, and to raise the profile of individual cities.

As part of this partnership, information on British artists was added to VisitBritain's website, highlighting places linked to the artists and their music to encourage them to visit. As visitors searched the site and destination guides such as those for London, Liverpool and Sheffield, they were able to download music linked to these places in order to provide a "soundtrack to their holiday". In addition, VisitBritain and EMI Music also worked together to promote new releases by British artists overseas.

VisitEngland "England Rocks!" campaign

A major campaign for England was also launched in 2007, "England Rocks!". This campaign also aimed to inspire tourists to visit places with links to rock and pop stars, and around 130 locations were included on a map. Locations included birthplaces and favourite hangouts of rock and pop stars, places that have inspired songs or appeared on album covers, as well as renowned venues. This campaign proved to be a success, generating PR coverage equivalent to £2.2 million of advertising in the first 6 months, and the website www.enjoyengland.com/rocks received over 250,000 unique visitors. The campaign website is still accessible, and the map can be viewed online.

Belfast music

"one of the great musical cities"

Belfast provides a good example of how different agencies can come together to form an organisation that promotes both music and tourism. Belfast Music is a partnership between Belfast City Council and Culture Northern Ireland (a web-based organisation funded mainly by the Arts Council of Northern Ireland). It is supported by the Northern Ireland Tourism Board who also administered the European Regional Development Fund under the European Sustainable Competitiveness Programme for Northern Ireland programme for this project.

The main rationale for this project is to bring information about music into one place, the website, and to promote this via e-marketing tools such as Twitter and Facebook. Belfast music also produced a mobile phone app that guides visitors around music venues and activities.

Visit Britain Campaign with AIF

In 2009, the Association of Independent Festivals negotiated to become part of a £1.8 million marketing initiative organised by VisitBritain. The European Value Campaign ran across 18 key European countries, and was aimed at the 25-35 age group. Using the slogan "See More For Less", VisitBritain focused on the benefits offered by the weak pound and Britain's relatively compact land area. As part of the deal AIF members offered overseas visitors a 20% discount on festival tickets purchased through the VisitBritain site.

AIF Twin Festivals initiative

Last year, the Association of Independent Festivals launched "AIF Twin Festivals: A Cultural Exchange", which partners the UK's leading independent festivals with their counterparts abroad. Based on the twin towns concept, festivals are paired with likeminded and similarly structured festivals from countries from around the world. Participating festivals help promote their twin's festival locally, take part in artist exchanges and talent discussions to help co-ordinate bookings of international artists and stimulate conversations with local music authorities for investment.

Photo: Richard Bull

About UK Music

UK Music is the umbrella organisation which represents the collective interests of the UK's commercial music industry - from songwriters and composers, artists and musicians, record producers and music managers to record labels, music publishers, the live music sector, and music licensing societies.

For all general queries relating to this report, contact:

Adam Webb
UK Music
British Music House
26 Berners Street
London W1T 3LR

T: 0207 306 4447
E: adam.webb@ukmusic.org



International Centre for Tourism and Hospitality Research Bournemouth University

The data analysis was carried out by Bournemouth University's International Centre for Tourism and Hospitality Research along with Bournemouth University's Centre for Event and Sport Research.

For queries relating to research and methodology, contact:

Professor Adam Blake
School of Tourism
Bournemouth University
Dorset House
Talbot Campus
Fern Barrow, Poole BH12 5BB

T: 01202 961 521
E: ablake@bournemouth.ac.uk