

OFFICIAL

# **PLYMOUTH MUSIC REPORT 2019**

Draft Version 5, 11 December 2019

## **ABOUT THIS REPORT**

Plymouth City Council has supported live music through a variety of initiatives including previous years Live Music Nights, offering opportunities for local artists to perform in the heart of the city centre, offering opportunities for local artists to perform at major city events and through providing free marketing opportunities for events and activities across the city through the city marketing website Visit Plymouth.

Following the closure of the Hub and the responses received Plymouth City Council initiated a round table to bring together partners from across the city to share concerns and discuss a way forward. Following this Music Venue Trust was appointed to carry out a piece of research to map the venues and audiences in and around the city and to put on a Fightback event to celebrate the broad range of music and grassroots venues that exist within the city.

There is an appetite and willingness to support the local music industry with the creation of a plan for music from the outcomes of this report and a partnership approach to support the industry working alongside Plymouth Culture, the organisation leading the cultural direction of the city.

In the 2021 Visitor Plan, Music has been identified as a key strand in the future vision and development for the positioning of the city, with a plan to position Plymouth as a music city, to build on its heritage and support the local music industry in promoting the city as a place to see, experience and work in music.

## **PLYMOUTH MUSIC: A POTTED HISTORY**

### **– Darren Johns, Plymouth Music Journalist**

We've had it good in this city over the decades. Semi-legendary venues that have played host to the best touring bands of their generation. These venues have shaped the city's music landscape, each staking a claim, each representing something that, once gone, left a gaping hole in our music community. Geriatric Plymouth rockers will tell you about the legendary Van Dike Club in Devonport, where a budding Jethro Tull launched the venue in August 1968 (when I was a month old). Hoary old Plymouth punks will regale you with lurid tales of the gory, glory years of the Sex Pistols at Woods in 1976 (playing under the acronym SPOTS – Sex Pistols On Tour) and of Adam Ant cutting his head open on the low ceiling. Less old Plymouth punks will reminisce about seeing their second-wave heroes play in Top Rank, the Roxy/Twos-Up, Fiesta or the Polytechnic throughout the '80s.

Mature Plymouth indie fans will wax lyrical about the beleaguered Cooperage era in the '90s when the likes of Catatonia and Space ruled the roost. Or the time when a not-quite-known Muse were booked to play there but the promoter got banned from the venue for criticising the owner in the pages of the local music/arts mag, The Scene. The show was subsequently moved to a small bus station cafe/bar called Tramps: a venue that would, itself, go on to become a mini-mecca for punks and reggae fans alike over the next ten years. Meanwhile, relatively baby-faced Plymouth rockers, punks and indie fans will speak fondly about the halcyon days of the White Rabbit from 2005 to 2014, with Dan James at the helm, which saw unforgettable performances from the likes of The Bronx, Enter Shikari, Kate Nash and Frank Turner. At the same time, the Phoenix, off Union Street, was catering for smaller but no less important DIY bands.

Their fates were varied. Van Dike's was raided by cops in 1971 while Fairport Convention were playing. It sounded the death knell (Manfred Mann being the final band to play there in 1972). The Cooperage suffered at the hands of an owner who, legend has it, won millions on the lottery yet still proceeded to ruin the venue.

In 2015, the White Rabbit (along with Tramps) was the first venue to fall to the urban renewal programme, making way for the Bretonside complex. The Hub suffered a similar fate this year, to make way for the Millbay Boulevard. Local music fans hoped for replacement venues, but it started to feel like music might be off the agenda.

These days it's easy to perceive that the main threat to music venues is private and public redevelopment, with the knock-on effects of soaring business rates and residential restrictions. The Energy Rooms at Maker in Cornwall: a wonderfully bespoke rural haunt that was part of the hugely popular Maker Festival. The venue/bar is now permanently closed despite an impassioned local community speaking up to save it.

Of course, everything changes over time. But with the closure of 35% of small venues nationally, and 28% in Plymouth in just the last ten years, there is a genuine sense that this change is premature and unfair. When a venue runs its natural course, there's a sense of acceptance. When a venue has the rug pulled out from under it, there's a sense of injustice.

The likes of the Junction, the Underground, B-Bar and the Hanging Gardens are doing a sterling job of hosting smaller (and sometimes prestige) independent artists. Similarly, essential youth-based venue, Livewire, has remained firm in the midst of mounting financial pressures. We need to treasure these venues and take genuine steps to protect, secure and improve them – their futures are as uncertain as the bands that tread their floorboards.

## METHODOLOGY

Music Venue Trust was commissioned to write a report for Plymouth City Council which identified opportunities for all stakeholders in the City to:

- Have a clear understanding of the City's music spaces
- Identify opportunities to stabilise, develop and improve its music venue cultural assets
- Create a vision of music within the city which is supported by the local music community
- Identify opportunities for the City to utilise that vision for social, cultural and economic regeneration impact.

Music Venue Trust undertook a survey of the local Grassroots Music Venue circuit to fully understand the local sector. 13 of the 17 identified Grassroots Music Venues took part in the online survey. A meeting was attended by more than 80 local representatives from the grassroots sector. Online one-to-one consultation was offered to all venues and taken up by 12 respondents. Additional one-to-one interviews took place with a range of stakeholders, including those from music education, larger venues, and community-based programmes and projects.

A review of all local policies, marketing and communications which might impact upon the sector was carried out. National and regional evidence, statistics, reports and studies were considered for both their impact and comparative purposes. A full list is available upon request.

## THE CITY'S MUSIC SPACES

18 venues in Plymouth currently operate within the accepted national definition of a Grassroots Music Venue<sup>1</sup>. 1 venue declined to be included in this report and is excluded at its request from all statistics and listings<sup>2</sup>.

- Air
- Annabel's Cabaret and Discotheque
- Bar Rakuda
- Blues Bar & Grill
- Crash Manor
- Hanging Gardens
- Karst
- Kitty O'Hanlon's
- Patchwork Studios
- Rock Bottom Bar
- Rockets & Rascals
- The Bread and Roses
- The Hutong Cafe
- The Junction
- The Old Morgue
- The Treasury
- Underground

Additionally, Plymouth has three larger 'Concert Hall' spaces.

- Plymouth Pavilions
- Pryzm
- UPSU Bar and main hall

Our research identified 9 other spaces which make an important contribution, including projects and programmes which are key elements of the talent pipeline essential to the future development of music within the City.

- CASA
- Factory
- Livewire
- B-Bar
- OMG
- Plymouth Athenaeum
- The House (UPSU)
- Switch
- The Fortescue
- The Terrace (Dancer Hip)

A full glossary and map of the City's Music Spaces is provided

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<sup>1</sup> <http://musicvenuetrust.com/wp-content/uploads/2018/11/Defining-Grassroots-Music-Venues.pdf>

<sup>2</sup> [https://www.tripadvisor.com/Attraction\\_Review-g186258-d13133109-Reviews-The\\_Pit\\_and\\_Pendulum-Plymouth\\_Devon\\_England.html](https://www.tripadvisor.com/Attraction_Review-g186258-d13133109-Reviews-The_Pit_and_Pendulum-Plymouth_Devon_England.html)

## THE CITY'S LOST MUSIC SPACES

Significant recent venues closures (and reasons for closure) in Plymouth include:

- The Cooperage (2005) - Financial problems, attempt to reopen in 2013 licence declined<sup>3</sup>
- Good Companions (2010) - Slated for demolition in 2018 for a student tower to be built<sup>4</sup>
- Admiral Stopford Arms (2012) - Noise complaints, subsequently converted into housing<sup>5</sup>
- The White Rabbit (2015) - Closed to be demolished as part of the Bretonside bus station redevelopment<sup>6</sup>
- Reel Cinema (2018) - Cinema with regular music events which could not withstand the competition of big chains<sup>7</sup>
- Voodoo Lounge (2018) - Student tower to be built<sup>8</sup>
- The Energy Room (2018) - Closed to Development<sup>9</sup>
- The Hub (2019) - Closed to make way for the Millbay Boulevard redevelopment<sup>10</sup>

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<sup>3</sup> <https://www.facebook.com/pages/category/Restaurant/Save-The-Cooperage-Plymouth-181568811933781/>

<sup>4</sup> <https://www.plymouthherald.co.uk/whats-on/plymouths-favourite-memories-top-pub-1364140>

<sup>5</sup> <https://plymouth.camra.org.uk/viewnode.php?id=60036>

<sup>6</sup> <https://thetab.com/uk/plymouth/2014/03/27/white-rabbit-due-to-be-demolished-5273>

<sup>7</sup> <https://www.plymouthherald.co.uk/news/plymouth-news/reel-cinema-plymouth-derrys-cross-1767358>

<sup>8</sup> <https://www.plymouthherald.co.uk/news/plymouth-news/gallery/truly-end-voodoo-lounge-mambos-1629769>

<sup>9</sup> <https://www.plymouthherald.co.uk/news/local-news/star-studded-film-released-highlighting-2543716>

<sup>10</sup> <https://www.plymouthherald.co.uk/news/plymouth-news/plymouth-live-music-venue-hub-2575215>

## PLYMOUTH: THE SOUTH WEST'S MUSIC DESTINATION

The City of Plymouth enjoys a thriving grassroots live music community which is a significant visitor attraction, producing positive economic, social and cultural impacts right across the local economy on employment, education, health, visitors, and encouraging the development of micro-businesses and entrepreneurs in the creative industries (musicians, managers, merchandisers, labels etc).

Plymouth has enjoyed a rich history as a primary destination for touring artists and music tourists in the South West, supporting not only the city economy but increasing cultural opportunities and inspiring cultural engagement throughout the South West region.

Teignmouth band Muse represent Britain's reputation for innovative and original music at sell out stadium shows around the world. They are a multi-million-pound asset for the UK, creating thousands of jobs while providing moments of cultural unification for millions of people across the world. Their ability to do so is founded in large part on the ready availability of venues in the South West at which they could hone their craft in the mid to late nineties, culminating in a breakthrough show at the Plymouth Cooperage in July 1997.

Plymouth provided a destination for artists and audiences at a regional and national level, and its importance as a music hub impacted positively upon the ability of surrounding towns and cities to both host events and to support artists in the South West to advance their careers.

**294,216** people attended one of **2829** live music events at a Grassroots Music Venue in Plymouth in the last 12 months. These events featured **8770** performances and provided employment opportunities for **31,117** musicians. Collectively, these events boosted the local cultural economy by **£4,083,555**.

**37%** of this spend - **£1,511,655** - was generated by visitors from outside the city.

These events produced impacts that are of benefit to the whole night time economy; for every £10 spent at a grassroots music venue, £17 is spent elsewhere in the night-time economy<sup>11</sup>. Visitors to live music events support other local businesses such as bars, restaurants, transport, and accommodation

**£6,942,043** was spent elsewhere in the local economy by visitors to Grassroots Music Venues.

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<sup>11</sup> <https://www.musicweek.com/live/read/number-of-grassroots-london-venues-remains-stable-for-first-time-in-10-years-says-report/067224>

**37%** of this spend - **£2,568,556** - was generated by visitors from outside the city.

These economic outputs were achieved by a venue circuit that is currently operating at an average annual capacity of **only 53%**.

Plymouth's position as a magnet for cultural visitors and creative activity has been negatively impacted by music venue closures. This situation is resolvable with a structured programme of additional support and investment into the City's Grassroots Music Venues, unlocking the potential in their capacity to deliver additional events and restoring the City's reputation as a cultural destination for the South West region.



## PLYMOUTH MUSIC CITY: UNLOCKING THE POTENTIAL

The Grassroots Music Venues in the city have the potential and capacity to play a key role in re-establishing Plymouth as the Music Destination of the South West and can make substantial additional contributions to the local economy and cultural offer.

- **5% increase** in attendance by Plymouth residents to existing grassroots music venue events would generate **£128,631.98** in additional cultural revenue and is deliverable within the capacity and programmes of those venues.
- **10% increase** would generate **£257,263.96**
  
- **5% increase** in attendance by visitors to the city to existing grassroots music venue events would generate **£75,545.77** in additional cultural revenue and is deliverable within the capacity and programmes of those venues.
- **10% increase** would generate **£151,091.54**
  
- **5% Increase** in attendance at existing events would generate a boost to the wider local night time economy (pubs, bars, restaurants, accommodation, transport) of **£347,102.15**.
- **10% increase** would generate **£694,204.30**
  
- **2 additional events** per existing venue per month would create
  - **408** new events
  - **£588,932.64** boost to the local cultural economy
  - **£1,001,185.42** boost to the night time economy
  - **1,265** new performance opportunities and
  - **4491** creative industries employment opportunities.
  
- **4 additional events** per existing venue per month would create
  - **916** new events
  - **£1,117,865.28** boost to the local cultural economy
  - **£2,002,370.84** boost to the night time economy
  - **2530** new performance opportunities
  - **8982** creative industries employment opportunities
  
- A new Grassroots Music Venue, based upon the existing local average venue of 196 capacity, would create
  - **8** new jobs
  - **£240,209.12** in direct cultural spend at the venue
  - **£408,355.47** spend in the night time economy
  - **166** new event events
  - **516** new performance opportunities
  - **1832** creative industries employment opportunities
  
- A new Grassroots Music Venue of 300 capacity in Plymouth would create
  - **12** new jobs

- **£367,667.02** in direct cultural spend at the venue
- **£625,033.88** spend in the night time economy
- **166** new event events
- **516** new performance opportunities
- **1832** creative industries employment opportunities

## PLYMOUTH GRASSROOTS MUSIC VENUES: THE STATISTICS

All statistics relate to financial year 2018/19 and consider the 17 Grassroots Music Venues which agreed to be part of this report.

### ***Capacity and Attendance:***

**196:** The average mean capacity per venue

**200:** The mode capacity

**3325:** The total nightly capacity across the city

**3.2:** Average of 3.2 nights of music per week per venue

**2829:** Total number of events per year

**3.1:** The average number of acts performing per event

**8770:** The total number of acts performing per year

**11:** The average number of musicians performing per event

**31,117:** The number of appearances by musicians at a Plymouth GMV per year

**53%:** The average audience capacity at which venues operated at across the year

**104:** The average number of people that attended a show at the average 196 capacity venue

**294,216:** The number of people who attended a live music performance at a Grassroots Music Venue in Plymouth in the last 12 months

### ***Programming and Content:***

**27%:** The percentage of Plymouth GMVs that rely solely on music for their programme

Programme options and the % of venues offering them:

- **36%:** Comedy
- **36%:** Tools & Space for Musicians
- **27%:** Other Support for Artists
- **72%:** Bar or Restaurant (outside of the live music offer)
- **41%:** Cinema/Film

Other opportunities included: Exhibition/Photo Gallery, Theatre/Dance, Vinyl Record Club, Private Functions, Spoken Word, Poetry, Flash Fiction events

### ***Structure, Motivations, Community and Social Engagement:***

**94%:** The percentage of Plymouth GMVs which are registered as Private Enterprises - only one venue is registered as a not-for-profit entity for any part of its operation

The personal primary focus of the venue manager/owner:

- **54%:** The Music
- **40%:** The Music and The Bar
- **6%:** The Bar

**54%:** The percentage of Plymouth GMVs which offer some form of Social & Cultural Education, such as music workshops, live technician training, internships etc.

**0%:** The percentage of Plymouth GMVs which provide an online access statement for customers with a disability

**80%:** The percentage of GMVs that expressed an interest in taking part in training and guidance on disability access

**72%:** The percentage of Plymouth GMVs which offer free earplugs for staff

**63%:** The percentage of Plymouth GMVs which offer free earplugs for customers

**0%:** The percentage of Plymouth GMVs that are signed up to the Musicians Union Fair Play Venue scheme, which sets out parameters for relationships between musicians, venues and promoters

**88%:** The percentage of Plymouth GMVs that have a policy in place to report sexual harassment within the venue

**0%:** The percentage of Plymouth GMVs signed up to a national standard policy on sexual harassment, such as Good Night Out

**11%:** The percentage of Plymouth GMVs that were aware of national policy changes which had a direct impact upon their protection/sustainability, such as reform of the PRS for Music Tariff LP to eliminate minimum fee or adoption of the Agent of Change policy within the National Planning Policy Framework

### ***Geographical Reach:***

Audience:

- **36%** from within the City
- **27%** from surrounding towns/suburbs
- **27%** from within the county
- **10%** from further afield

Artists:

- **36%** from the City
- **18%** from surrounding towns/suburbs
- **9%** from within the county
- **27%** National Touring artists
- **10%** International Touring Artists

### ***Employment and Volunteering:***

**132:** The number of FTE staff employed by Plymouth GMVs

**112:** The number of FTE Volunteer support roles which were delivered by in excess of 250 individuals

### ***Income:***

**£4,083,555:** The gross Income of Plymouth's GMVs

**£240,209:** The average income per venue

**34.7%:** The percentage of income that arises from ticket sales

- **£85,218** per venue
- **£1,448,712** across the city

**£4.92:** The average cost of a ticket in Plymouth

**65.3%:** The percentage of income that results from Bar & Catering sales

- **£154,991** per venue
- **£2,634,843** across the city

**£8.95:** The average amount spent on bar & catering by a gig attendee in Plymouth

### ***Expenditure***

**£3,863,219:** The gross expenditure of Plymouth GMVs, exclusive of venue operator/owner fees or investment, in the last financial year

**£227,248:** The average expenditure per venue

**46.9%:** The percentage of expenditure which arises from live music performances, facilities, production & promotion

- **£106,632** per venue
- **£1,812,739** across the city

**53.1%:** The percentage of expenditure which arises from bar & catering facilities and supplies

- **£120,617** per venue
- **£2,050,481** across the city

### ***Profit and Loss***

**£12,961:** The notional profit per venue

*NB: Notional profit is exclusive of any investment into infrastructure and represents the maximum fee that can be charged for management/ownership of the premises.*

**72%:** The percentage of GMVs that invested into Sound, Lighting, Audience and Artist facilities

Live Music:

- **£1,812,739:** The amount Plymouth Grassroots Music Venues invested into live music in the city
- **£1,448,712:** The amount Plymouth GMVs raised from live music ticket sales in the city
- **£364,027:** The total amount Plymouth GMVs lost on live music
- **£21,413:** The amount being lost by the average Plymouth GMV by investment into live music

### ***Business Rates Analysis***

**12:** The number of venues in the City that pay Business Rates – Of the 17 venues, 5 have rateable values that provide them with access to full rate relief under the Small Business Relief scheme

**53%:** The percentage of Rate Paying Plymouth GMVs which are assessed using Fair Maintainable Trade (FMT)

**47%:** The percentage of GMVs that are assessed using Square Meterage (Sq M) calculation

**18%:** The premium that venues calculated under FMT pay above that paid by Sq M calculated premises

**£433,250:** The Rateable value of Rate Paying GMVs in the city, average rateable value £36,104

**£205,630.80** The amount Rate Paying GMVs in the city pay in Business Rates, average £17,135.90

**7.5%:** The percentage of gross expenses that the Business Rate charges equate to, where a GMV qualifies to pay Business Rates

**14.2%:** The percentage of every live music ticket bought that is spent on Business Rates across the City (70p)

**20%:** The percentage of every ticket sold equated to the Business Rate charges paid, in the 12 GMVs currently paying Business Rates.

## LOCAL PLANS & POLICIES: ANALYSIS

- The Local Development Framework (LDF) 2007:
  - “It specifically identifies the need for improvements to Plymouth’s cultural provision as a key part of Plymouth’s urban renaissance.”
  - three mentions of the word ‘music’ and one mention of ‘live music’.
- The LDF is no longer the development plan for Plymouth and has been replaced by the Plymouth & South West Devon Joint Local Plan.
- The Plymouth & South West Devon Joint Local Plan 2014-2034:
  - Paragraph 4.99 states: “Developing a distinctive and dynamic cultural sector in Plymouth that will unlock the potential of the city’s arts, creative sector and cultural heritage will help raise the profile of Plymouth and support the visitor economy. It will also provide opportunities for local communities and attract those seeking to relocate for business offering a lifestyle that cannot be found elsewhere, with arts, music, drama, comedy and entertainment forming a unique city identity that supports growth.
  - Policy PLY6: Improving Plymouth’s City Centre subparagraph 8 mentions: ‘Supports a diverse and active evening and night-time economy catering for a wide cross section of the public.’
  - Paragraph 4 states: “Strategic Outcome Plymouth will be fulfilling its role as a regional city and a major economic driver for the Heart of the South West, building on its rich cultural, natural and built assets. It will be stimulating growth to the benefit of the city and its wider sub region and providing the focus for culture, specialist health care, education, shopping, leisure attractions and hospitality services for the wider area.”
  - Paragraph 4.10 “Plymouth also has a pivotal arts and cultural role in the south west and leads on regional initiatives for culture to maximise investment, working in partnership across the peninsula. Plymouth has the ability through the growth of the creative industries and its size as a city to become a regional hub for creativity and culture specifically as a gateway for international practice and development.”
  - There is no specific reference to live music venues
  - Music is mentioned solely in the context of the Plymouth Music Zone (see below)
- Plymouth has developed its own Plymouth Music Zone using music to ‘develop skills and the health and emotional wellbeing of participants’ through workshops and training. Efforts are focused on ‘musicians and music leaders’:
 

<https://www.plymouthmusiczone.org.uk/what-we-do>
- Local Economic Strategy Review 2013/2014 does not contain mention of ‘music’, ‘music venues’ or ‘night-time economy’:
 

<https://www.plymouth.gov.uk/sites/default/files/LESReviewFull.pdf>
- Plymouth Plan 2034:
  - Policy INT4 Delivering a distinctive, dynamic cultural centre of regional, national and international renown
  - Sub paragraph 5: Developing and providing more music venues for local and underground talent, and seeking to build on opportunities to stimulate further

cultural opportunities across the city.”:

<https://www.plymouth.gov.uk/sites/default/files/PPRefresh2.pdf> page 77.

- Policy HEA1 Addressing health inequalities, improving health literacy: “Changing attitudes towards alcohol by shifting the focus of the night-time economy towards more cultural and sporting activities to create a safer more vibrant Plymouth.”



## CONCLUSIONS OF THE REPORT

This report presents an opportunity for a city-wide, comprehensive view of the importance of grassroots music venues as the lynchpin to the future plans of the City and contains recommendations to unlock the potential of the Cities Grassroots Music Venues.

The United Cities and Local Governments paper, *Why must culture be at the heart of sustainable urban development?*<sup>12</sup>, looks at how culture can be used as a tool for: social cohesion; sustainable development; economic development; policy-making; democracy and participation; community-building; climate change; and the celebration of local heritage. These opportunities are important to all stakeholders in Plymouth for the future of the city.

Plymouth has experienced a long-term reduction in the music opportunities that it offers to new and emerging artists and entry level audience. That reduction in facilities available to artists and audiences is broadly in line with national and regional averages, but has deeper practical impacts, and is therefore felt more keenly, in Plymouth. These negative outcomes result from the unique nature of the City's music community, its geographical location, and its historical importance as a hub of music to the South West as a region. Additionally, we note that while changes to national legislation and support available for grassroots music venues has substantially reduced both the rate of decline and the overall reduction in facilities at a national level, in Plymouth the rate of decline is accelerating; 50% of the closures detailed in this report took place within the last 20 months.

7 significant music venues were lost in Plymouth within the last decade representing the direct loss of £2.8 million in economic activity, 91 FTE jobs and an indirect loss of £4.8 million in economic activity in the local night-time economy.

As a result of this reduction in facilities, Plymouth has lost its historical position as a Primary touring location for international, national and regional artists, with knock-on impacts right across the South West region for artists and audiences alike.

This loss of key local music industry assets has directly assessable impacts right across the cultural and night-time economy, both in the direct short and long-term and throughout the creative industries<sup>13</sup>.

The reduction in physical facilities providing music opportunities resulted from:

- Poor communication between, and on behalf of, stakeholders; musicians, venues, audiences, planners, developers, public services, music educators, resulting equally from a lack of understanding and a loss of trust; the authors of this report were significantly delayed in their ability to deliver this report by the need to confront these issues.
- A loss of trust and confidence between stakeholders in the City, leading, in turn, to an unwillingness to engage; emerging challenges to Plymouth Grassroots Music Venues were a matter of public record and discussion, known about, and debated in local press and recognised in policy documents<sup>14</sup> but were not acted upon collectively by the stakeholders at any of several successive opportunities.

<sup>12</sup> [http://www.agenda21culture.net/sites/default/files/files/documents/en/culture\\_sd\\_cities\\_web.pdf](http://www.agenda21culture.net/sites/default/files/files/documents/en/culture_sd_cities_web.pdf)

<sup>13</sup> the loss of The Hub, for example, resulted in the loss from the City of the DBS Live Sound educational programme

<sup>14</sup> <https://www.plymouth.gov.uk/sites/default/files/PCCArtsAndCultureTopicPaper.pdf>

- Failure to understand and therefore recognise the importance of grassroots music venues as important cultural facilities at both a microeconomic and macroeconomic level: Key stakeholders in the City did not have a full understanding of the value of what the City had, nor its importance within the regional and national music industry.
- Lack of discussion on either the direct or indirect impact on the broader Night-Time Economy from the loss of key destination cultural spaces
- Lack of a coherent music strategy which addresses the economic opportunities locally, regionally and nationally available to the City.

There are significant opportunities for all stakeholders. Alongside the direct reduction in the number of facilities, there has been a long and sustained collective lack of investment in the remaining music spaces driven by financial constraints. This manifests itself in declining infrastructure and can be addressed through emerging initiatives on national funding. Plymouth GMVs have not so far been acknowledged at a policy, marketing and engagement level. This manifests itself in a lack of recognition within local plans and policies and can be addressed through a review.

It is important to confront the view that the responsibility for the protection, maintenance and development of these grassroots spaces can or should fall solely on the proprietor of the business. The whole city has an interest in the value and vibrancy these venues provide, whether it is their role in the pipeline of skills, talent development, artist economic activity, student retention, health and well-being<sup>15</sup> or audience development. The closure of a single venue hits the whole city, local community and the music industry, not just the single business owner.<sup>16</sup>

Cities across the world now recognise this, leading to the creation of interventions such as the Music Cities Movement<sup>17</sup>, London Grassroots Music Venue Rescue Plan<sup>18</sup>, Future Cities: This Must Be The Place<sup>19</sup>, Manchester Music Report.<sup>20</sup> The music industry itself recognises its stakeholder position, resulting in the creation of MVT's own Pipeline Investment Fund<sup>21</sup>, supported by companies such as Live Nation and AEG<sup>22</sup>.

The City has a perfect opportunity to create a 21st Century vision of Plymouth as a Music City, mirroring work taking place elsewhere in the world such as within the Music Cities Network<sup>23</sup>, specifically Groningen, Netherlands, where a structured and sustained approach to nurturing and

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<sup>15</sup> <https://www.newsweek.com/going-concerts-can-help-you-live-longer-according-new-study-863628>

<sup>16</sup> *Teignmouth band Muse represent Britain's reputation for innovative and original music at stadium shows around the world. There are a multi-million-pound asset for the UK, creating thousands of jobs while providing moments of cultural unification for millions of people across the world. Their ability to do so is founded in large part on the ready availability of venues at which they could hone their craft in the mid to late nineties, including an early show at the Cooperage in July 1997.*

<sup>17</sup> <https://www.ifpi.org/downloads/The-Mastering-of-a-Music-City.pdf>

<sup>18</sup> [https://www.london.gov.uk/sites/default/files/londons\\_grassroots\\_music\\_venues\\_-\\_rescue\\_plan\\_-\\_october\\_2015.pdf](https://www.london.gov.uk/sites/default/files/londons_grassroots_music_venues_-_rescue_plan_-_october_2015.pdf)

<sup>19</sup> [https://www.legalandgeneralcapital.com/files/media-centre/\\_press-releases/sound-diplomacy-landg-2019.pdf](https://www.legalandgeneralcapital.com/files/media-centre/_press-releases/sound-diplomacy-landg-2019.pdf)

<sup>20</sup> <https://www.ukmusic.org/research/greater-manchester-music-review-2019/>

<sup>21</sup> <http://musicvenuetrust.com/2018/10/music-venue-trust-launches-pipeline-investment-fund-challenge/>

<sup>22</sup> <http://musicvenuetrust.com/2019/05/funding-breakthrough-for-grassroots-music-venues/>

<sup>23</sup> <https://www.musiccitiesnetwork.com/about-mcn>

developing the local music community and grassroots music venues has had radical impacts upon the City's vibrancy and demographics.<sup>24</sup>

It is essential that this relationship is a two-way street; the local music community needs to describe and communicate about itself in a manner which enables other stakeholders to offer their support.

The City is geographical distant from the centre of the UK's live music industry in London. The City's grassroots music venues are cognitively distanced from that live music industry, and physically manifest this distance in a lack of knowledge about initiatives within that industry to support and develop them. This cuts across financial initiatives (such as Arts Council England's Supporting Grassroots Live Music Fund – announced May 2019<sup>25</sup>) and strategy and policy changes (such as the amendment to the National Planning Policy Framework to adopt Agent of Change as a protection measure specific to music venues – announced July 2018<sup>26</sup>). This cognitive distance is not unique to Plymouth; GMVs in Northern Ireland, North Wales and Northern Scotland have expressed similar feelings of isolation from national initiatives. However, the City's GMVs are unique in their resulting lack of engagement with the opportunities such initiatives present.<sup>27</sup>

The City's music venues have been locally responsive to issues such as standards of practice for the employment of musicians, the safety of women and disabled access, but are not engaged with national strategy or organisations which offer support to them to deliver to these social, cultural and economic agendas<sup>28</sup>

This lack of engagement with a developing national picture has serious impacts upon the sustainability of the City's grassroots music venues and the protections such a cultural asset is now able to enjoy.<sup>29</sup> Compared with the national average, a Grassroots Music Venue in Plymouth is ten times less likely to know about opportunities for social, cultural and economic support and ten times more likely to be unaware of protections to its operation that it should be enjoying.

In a practical demonstration of the shift towards a more positive approach, a number of venues/promoters/stakeholders have created a group called Grassroots Music Alliance Plymouth, which is already trying to create solutions to some of these challenges; Diversity, Access, Asset Mapping, Data Capture are all early agenda items and practical issues such as marketing space and ticket availability are being addressed with direct solutions.

The creation of this collective illustrates that despite this period of losses and under investment, Plymouth continues to benefit from a resilient, innovative and passionate music community which

<sup>24</sup> <https://www.musiccitiesnetwork.com/cities/groningen>

<sup>25</sup> <https://www.artscouncil.org.uk/funding/project-grants-supporting-grassroots-live-music>

<sup>26</sup> <https://www.gov.uk/government/news/strengthened-planning-rules-to-protect-music-venues-and-their-neighbours>

<sup>27</sup> *In 2014 just 3% of UK GMVs operated under some format of not-for-profit structure. In 2019, as a result of national initiatives led by MVT, this number has risen to 31%. Correctly describing the provision of live music as a not-for-profit activity within a correctly structured not-for-profit cultural entity has significant positive financial implications for a grassroots music venue operation. 100% of Plymouth venues operating solely as a full time Grassroots Music Venue identified themselves as Private Enterprises in our survey.*

<sup>28</sup> <https://www.musiciansunion.org.uk/Files/Guides/Playing-Live/Fair-Play-Guide.aspx>

<https://sgfw.org.uk/>

<http://www.attitudeiseverything.org.uk/>

<sup>29</sup> *In a national survey, 85% of grassroots music venues knew and understood the Agent of Change principle in the National Planning Policy Framework and how it protects their venue from future development. In the Plymouth survey, only 1 respondent (8%) was aware of this protection*

has developed organically. We found numerous examples of excellent practice that was overcoming significant obstacles to deliver music opportunities by collaborative working; a sense that putting the show on was the most important thing and whatever needed to be done to make that happen, there was someone who knew someone who could and would make that happen.

We also identified that frequently this organic process of development and collaboration was not properly recognised, acknowledged and described as a unique asset of the local community.<sup>30</sup> As we enable music venues within the City to understand and articulate their role as cultural hubs and local assets, there is an opportunity to highlight the collaboration and interactivity between venues, education, youth projects, to describe how the work of one stakeholder impacts on the ability of another to deliver its work.

This is the opportunity to create a narrative that describes the local Plymouth Pipeline of Talent, a City where you can pick up a guitar and learn the skills you need at 12, play your first gigs at 14, start to play at a local venue with ticket sales at 16, get the training and skills you need for a portfolio music career at 18, start to export your skills at a national and international level at 21, and develop a lifelong passion for and potential career in music. The City has all it needs to create this narrative; Plymouth: Music City.

The tangible sense of a passionate music community that wants to enable artists and audiences represents a unique selling point for the City which all stakeholders can value. The uniqueness of the City's grassroots music community presents an opportunity to rebuild the City as a regional hub and a primary music destination.

Acting collectively, this report provides the chance for everyone who wants to realise the potential of music in Plymouth to:

- take urgent practical action to financially stabilise its remaining Grassroots Music Venues
- review and amend local plans & policy so that further losses of its cultural infrastructure are averted or mitigated
- establish communication and information opportunities that build trust and confidence
- create a collective long-term strategy to develop and support its grassroots music community as a unique selling point of the City
- build a positive marketing strategy around that identity, that fully engages with the local community and reaches out to the rest of the South West region
- consider the long-term social, cultural and economic opportunities of Plymouth's unique musical selling point and adopt a branding that recognises its potential to be a city of organic, grassroots music
- restore its position as a Primary touring location and South West Hub of Music, and fully engage with the developing national support for Grassroots Music Venues.

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<sup>30</sup> for example, musicians that initially started at Livewire have become key elements of the programme at other local venues, but there was no specific recognition or acknowledgement of that process. Technical crew working at venues told us that they were graduates from, or current students at, DBS, but this was not a formalised relationship.

## RECOMMENDATIONS

### *Immediate Actions:*

#### 1. FINANCES:

Plymouth's Grassroots Music Venues are in a fragile and perilous economic position. We recommend that Plymouth City Council considers providing temporary relief to the local Business Rates paid by these venues, with the purpose of creating a period in which they can stabilise their economic position, restructure, and engage fully with the opportunities within this report. Other levies that fall within the control of Plymouth City Council should be reviewed for their impact on the immediate viability of the local circuit.

#### 2. PLANNING:

In consideration of the direct causes of local venue closures, Plymouth should revise its Local Planning Policy to adopt Agent of Change to prevent additional losses<sup>31</sup>.

Where such loss is an inevitable consequence of desirable regeneration, Plymouth should adopt a Local Redevelopment Policy that commits Developers to appropriate investment in the local music eco-system under a Section 106 commitment.

Where development has any potential to impinge upon the working operation of a venue, Plymouth should adopt Deed of Easement as a standard protection within new developments within the vicinity of a venue<sup>32</sup>.

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<sup>31</sup> <https://www.residentadvisor.net/news/44513>

<sup>32</sup> <https://www.footansteve.com/updates-a-publications/4007-deeds-of-easement-of-noise>

## RECOMMENDATIONS

### *Short Term Actions:*

#### 3. NETWORKING:

Encourage the development of the Grassroots Music Alliance to create a fully representative network that includes all venues and the wider music sector. The alliance will have a remit to:

- I. Gather robust venue/industry data on an ongoing basis
- II. Engage with national initiatives, such as Attitude is Everything, Good Night Out, Musicians' Union and Safe Gigs for Women, to establish a best practice manual for Grassroots Music Venues
- III. Work with Plymouth Culture, Plymouth Your Space and Vacancy Atlas project with Inter(change) to identify opportunities within the city for additional music venues and music programming
- IV. Act as a representative for the music sector, through the appointment of a nominated person, to provide a point of contact for Plymouth Culture in the development of the Music City agenda.

#### 4. FUNDING:

Plymouth City Council and Plymouth Culture to appoint internal staff resources to enable and support venues and the music sector to make applications for funding to national grant agencies, releasing funding into the city.

#### 5. POLICY AND PRESENTATION:

Review Plymouth City Council policies, marketing and image so that the contribution of music venues is recognised and represented in all documents, media and marketing.

## RECOMMENDATIONS

### *Mid Term Actions:*

#### 6. LOCAL INITIATIVES:

Grassroots Music Alliance Plymouth to bring forward specific proposals that identify opportunities to promote live music and remove obstacles to live music performance. During the compilation of this report the following specific proposals were brought to our attention and should be considered by GMAP:

- i. Creation of a Musicians' Parking Permit to be held by venues so that parking fines are avoided and load ins are manageable
- ii. A review of local Licensing restrictions to ensure that there is clarity, equity and fairness in the Licensing System
- iii. A concerted annual campaign to engage with new University students that highlights the City's live music offer
- iv. Access to key marketing opportunities at key locations throughout the city
- v. Review of Busking rules within the City.

#### 7. RESEARCH:

Undertake a study with partners in other Devon and Cornwall towns and cities on South West touring to understand what a functioning touring circuit might look like. The aim should be to re-establish that touring network so that artist touring to and from Plymouth is an economically viable option - to improve Plymouth's ability to attract and host touring artists, the City must address the geo-economic obstacles that prevent artists choosing the City and make it a viable option for artists to undertake such tours. (see also Recommendation 13)

## RECOMMENDATIONS

### *Long Term Actions:*

#### 8. CULTURAL STRATEGY:

Ensure that the development of the culture strategy acknowledges the role of music in developing the image and reputation of the city as a cultural destination by engaging stakeholders from the music community in its development.

#### 9. FACILITIES AND SERVICES:

A review of the supporting facilities, services and marketing tools available to artists which would encourage the re-establishment of Plymouth as a touring destination; suitable and affordable accommodation, local backline and tech services, accessible marketing platforms.

#### 10. INDUSTRY EVENT:

The establishment of a Plymouth-based music industry conference and event in 2021 aimed specifically at the South West as a touring circuit: A 'South West by South West'. The aim of this event would be to engage with the local, regional and national music industry, and to highlight the South West's musicians and music opportunities.

#### 11. PUBLIC EVENT:

An annual Music Amnesty for unused instruments/equipment in the city; items donated to be offered on a free loan basis to students as part of the welcome park when they arrive in the city, cementing the concept that Plymouth is a destination that wants you to engage with music.

#### 12. REGIONAL INITIATIVES

Based on work at Recommendation 11, the City to work with South West partners to create a South West Tours promoter organisation and identify funding that would support national and international artists to undertake tours of the South West.



## RECOMMENDATIONS

### *For Consideration:*

#### 13. A NEW VENUE:

During the creation of this report, it became clear that additional local debate was needed on the creation of a mid-sized venue (800-1200 capacity) - this was both supported and opposed, because it was felt it was needed but also there were concerns about how it might create competition.

Grassroots Music Alliance Plymouth should consider if the local music community believes such a venue is desirable and, if so, how it might integrate into the local venue ladder, through structure or control, without such a venue dominating local audience attention.

During the research for this report, MVT was advised of moves by Plymouth Pavilions to adjust its capacity to fill this gap on the Venues Ladder, and of an opportunity to potentially restore the Reel Cinema with a usage for this purpose.

Local stakeholders should strongly consider the reasons why a commercial entity (such as Academy Group, AEG, DHP) has not currently sought to create such a venue. Our view is that Plymouth has not demonstrated at a national level that it is a city with sufficient demand or an active and engaged music scene. Creating such a venue without a clear message about the economic opportunity runs significant risk of creating an empty shell without artists to fill it. Mid-size venues do not follow the Field of Dreams motto; just because you build it does not mean they will come.

## Annex 1: National, Regional and Local Context

### NATIONAL CONTEXT – GRASSROOTS MUSIC VENUES IN 2019

- A. A nationally and internationally accepted definition of a Grassroots Music Venue (GMV)<sup>33</sup> is now in wide usage, including by Parliament.<sup>34</sup>
- B. GMV exhibit a specific set of social, cultural and economic attributes which are of special importance to communities, artists, audiences, and to the wider music industry. Across sixty years, this sector has played a vital research and nurturing role in the development of the careers of a succession of UK musicians, from The Beatles (The Cavern, Liverpool) through The Clash (100 Club, London), The Undertones (The Casbah, Derry), Duran Duran (Rum Runner, Birmingham), Housemartins (Adelphi, Hull), Radiohead (Jericho Tavern, Oxford), Idlewild (Subway, Edinburgh), Super Furry Animals (Clwb Ifor Bach, Cardiff). All three of the UK's highest grossing live music attractions in 2016 (Adele, Ed Sheeran, Coldplay) commenced their careers with extensive touring in this circuit.<sup>35</sup>
- C. GMV constitute a network with comprehensive geographical presence and with a reach that extends into communities which are otherwise not engaging with culture<sup>36</sup>.
- D. During the last twenty years, this sector has declined substantially:
- I. 144 GMV were trading in London in 2007
  - II. Only 94 GMV were trading in London in 2016, a reduction in the number of trading spaces of 34.7%<sup>37</sup>
  - III. Iconic spaces across the UK closed during this period, including The Marquee (London), The Point (Cardiff), The Arches (Glasgow), Duchess of York (Leeds), Princess Charlotte (Leicester), TJs (Newport), Roadhouse (Manchester), Boardwalk (Sheffield), The Picture House (Edinburgh), The Crypt (Hastings), The Croft (Bristol)<sup>38</sup>
  - IV. Every major town and city saw a decline in the number of trading venues
  - V. Of the 25 venues that launched the live career of Oasis in 1993, only 11 remain open.<sup>39</sup>
- E. Alongside closures, these venues also experienced<sup>40</sup>:
- I. Significantly reduced audience attendances; GMV operate at significantly reduced capacity, with an average attendance of 160.5, only 51%
  - II. Reduced opportunities for artists to perform; GMV are open for live music 3.89 times per week, only 55% of the time

<sup>33</sup> <http://musicvenue trust.com/wp-content/uploads/2016/09/Defining-Grassroots-Music-Venues.pdf>

<sup>34</sup> <http://www.citymetric.com/horizons/year-future-britains-music-venues-was-placed-firmly-political-agenda-1678>

<sup>35</sup> <http://www.bbc.co.uk/newsbeat/article/34571762/music-venues-in-the-uk-have-reached-crisis-point-says-london-club-owner>

<sup>36</sup> <http://uklivemusic census.org/>

<sup>37</sup> <https://www.london.gov.uk/what-we-do/arts-and-culture/music/saving-londons-music-venues?source=vanityurl>

<sup>38</sup> <http://www.gigwise.com/photos/92945/closed-down-14-legendary-music-venues-that-have-been-lost>

<sup>39</sup> <http://www.bbc.co.uk/news/entertainment-arts-35399160>

<sup>40</sup> MVT GMV Survey 2016

- III. Rapidly deteriorating infrastructure that is inadequate to support the delivery of artistic excellence.
- F. As a result of the decline, entry prices have stagnated, resulting in:
- I. reduced earnings potential for artists
  - II. a downward spiral of under investment
- A. These direct impacts have short and long-term implications for the UK live music industry identified in the UK Live Music Census 2017<sup>41</sup>
- I. One third (29%) of Promoters said that venue closure had an extreme, strong or moderate negative impact on their events in the last 12 months.
  - II. When asked to describe the most significant problems faced as a live music promoter, one third of respondents (34%) mentioned venues
  - III. 44% of promoters who responded to a question about the barriers that impact on putting on live music in their locale also mentioned venues. Problems and barriers included a lack of venues, cost of venues, and a lack of suitable infrastructure within the venue itself.
  - IV. 42% of promoters who responded to an open-ended question about what the (local, national and/or UK) government could do to improve the live music scene mentioned venues, 37% mentioned funding or grants; and 16% mentioned schools or education
  - V. Festival Headliners are ageing<sup>42</sup>
  - VI. New artists are struggling to build audiences
- G. Despite this decline, there are still circa 650 such music venues currently operating in the UK.
- H. Audience research conducted by MVT in April 2016 formed part of the UK Music Wish You Were Here Report 2016<sup>43</sup>, the first time accurate tracking of activity in this sector had been attempted.
- I. Venue and artist research carried out by MVT in May and June 2016 provided information about audience attendance and performance activity related to GMV. That research established that GMV:
- I. Have an average capacity of 316, a total capacity of 142,200 per night
  - II. Deliver 17540 shows per week, 91,026 shows per annum
  - III. Create 5251 performance opportunities per week, 273,078 performance opportunities per annum
  - IV. 280,875 people attend every week, 14,605,519 people per annum.
- J. Based upon the above and in-depth research carried out in 2015 to 2017 by the Mayor of London and the Greater London Authority, specific to the function and operation of GMV within London<sup>44</sup>, it is deduced that these 450 GMV:
- I. Contribute circa £437million to the UK economy

<sup>41</sup> <http://uklivemusiccensus.org/>

<sup>42</sup> <https://www.economist.com/news/britain/21656235-why-boom-big-outdoor-music-festivals-may-not-be-sustainable-smells-middle-aged-spirit>

<sup>43</sup> [http://www.ukmusic.org/assets/general/Wish\\_You\\_Were\\_Here\\_2016\\_Final.pdf](http://www.ukmusic.org/assets/general/Wish_You_Were_Here_2016_Final.pdf)

<sup>44</sup> <https://www.london.gov.uk/what-we-do/arts-and-culture/music/saving-londons-music-venues>

- II. Invest circa £210million per annum in talent development
  - III. Support circa 10,800 full time equivalent jobs.
- K. GMV are the small business entrepreneurs of the UK music industry, taking exceptional risks with programming and support for new and emerging artists. This activity produces long-term significant economic outcomes for the wider industry and for the UK. In 2015, the UK Music Industry provided:
- I. Total GVA: £4.1billion
  - II. Total Export Revenue: £2.2billion
  - III. 119,020 FTE jobs.
- L. GMV have demonstrated a strong and passionate engagement with local and regional audiences<sup>45</sup>, addressing ACE and DCMS core aims of ensuring experiences are available to everyone.<sup>46</sup>
- M. In response to this crisis, in 2019 Arts Council England established the Supporting Grassroots Live Music Fund, a ringfenced fund of £1.5 million of public money specifically aimed at developing and improving this circuit.
- N. An inconsistent approach to what constitutes a cultural venue from the cultural sector has created a common perception that theatres, arts centres, concert halls and galleries require subsidy to operate, yet a suggestion that GMV may require support too is regularly met with the assertion that these are commercial operations. The fact that talent developed in these spaces may in future generate significant money does not make them commercially viable when there is no connection with the future wealth; the same principle is not applied to development of talent in other styles of music or artforms.
- O. Across the EU, governments have provided a variety of mechanism to subsidise and underwrite investment in GMV, resulting in an average subsidy of 35% of total turnover, as high as 70% in France.<sup>47</sup> These initiatives have resulted in exceptional facilities in many of our neighbouring territories, with greater performance fees to artists, higher employment levels, greater numbers of apprentices and training opportunities being just some of the outcomes.<sup>48</sup>
- P. The UK's comparative lack of support and investment into GMV is failing to compete with emerging markets and to support the development of skilled UK artists and supporting professionals, specifically those at the beginning of their careers.
- Q. Each of the UK's nearest geographical competitors for international touring have established programmes to support infrastructure for GMV. Examples of comparative investment in emerging markets:

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<sup>45</sup> <http://uklivemusiccensus.org/>

<sup>46</sup> <http://www.artscouncil.org.uk/about-us/our-mission-and-strategy>

<sup>47</sup> [http://www.icce.rug.nl/~soundscapes/DATABASES/MIE/Part1\\_chapter07.shtml](http://www.icce.rug.nl/~soundscapes/DATABASES/MIE/Part1_chapter07.shtml)

<sup>48</sup> <http://www.live-dma.eu/wp-content/uploads/2016/07/Live-DMA-data-2014-survey-presentation-for-online-publication-version-18-July-2016.pdf>

- I. Germany: A package of investments into GMV to a value of €8.2million in November 2016 (Förderprogramme zur technischen Erneuerung der Aufführungstechnik von Musikclubs).<sup>49</sup> The programme is specifically aimed at a move to digital equipment which is high quality and reduces energy consumption and costs.
- II. Netherlands: Every middle-sized town or city (approx. 100.000 inhabitants) has a music venue for popular music genres. Fifty-one music venues receive funding from the Government following the advice of Muziek Centrum Nederland.<sup>50</sup>
- III. Denmark: An infrastructure and trading subsidy budget which has developed 19 GMV of exceptionally high quality. These venues receive ongoing subsidy to create local jobs, support for musician micro-businesses, and platforms for local emerging talent – at the full subsidy rate, each of these 19 venues commits to paying each performing musician 2000 Krone, a fee equating to £250 per band member per performance.<sup>51</sup>
- IV. Norway: The Musikkutstysrordningen (Norwegian Musical Equipment Foundation) gives bi-annual grants to studios, venues, community groups, and rehearsal spaces for upgrading facilities and maintaining and purchasing equipment. It was established in 2009 and distributes circa 27.5 - 30 million kr per year (£2.5 - £2.8 million) <sup>52</sup>
- V. France, GMV receive operational support from : Le ministère de la Culture et de la Communication, Le ministère de la Ville, de la Jeunesse et des Sports, Le ministère de la Justice L'Union Européenne - Lifelong Learning Programme and La SACEM. Le CNV - Centre National de la chanson des Variétés et du jazz – administers two schemes by which a levy is paid by all live music events and distributed to GMV:
  - i. to promote risk taking with programming at grassroots level.<sup>53</sup> 195 venues benefitted in 2015
  - ii. to improve the infrastructure at GMV.<sup>54</sup> 59 venues benefitted in 2015.

<sup>49</sup> <http://www.livemusikkommission.de/foerderprogramme-zur-technischen-erneuerung-der-auffuehrungstechnik-von-musikclubs-starten-2017/>

<sup>50</sup> [https://en.wikipedia.org/wiki/Muziek\\_Centrum\\_Nederland](https://en.wikipedia.org/wiki/Muziek_Centrum_Nederland)

<sup>51</sup> <http://dansklive.dk/>

<sup>52</sup> <http://www.musikkutstysrordningen.no/om-oss/>

<sup>53</sup> <http://www.cnv.fr/activite-salles-spectacles-7>

<sup>54</sup> <http://www.cnv.fr/amenagement-et-equipement-salles-spectacles-6-et-6bis>

## REGIONAL CONTEXT- THE SOUTH WEST 2019

The UK Music Music by Numbers Report 2019<sup>55</sup> revealed:

- 939,000 music tourists came to the South West in 2018 for a festival or live show
- Music tourist spend amounted to a total of £445 million in the South West
- 5810 full-time jobs are sustained by music tourism in the South West

Grassroots Music Venues right across the South West have demonstrated a similar decline:

<https://www.cornwalllive.com/whats-on/music-nightlife/17-music-venues-you-really-3338181>

## LOCAL DEMOGRAPHICS

Demographics of Plymouth: Plymouth report:

<https://www.plymouth.gov.uk/sites/default/files/Plymouth%20Report%20October%202017.pdf>

- Urban population of 260,203 (last census in 2011) - Office For National Statistics
- Plymouth GDP was 5,169 million in 2013 which makes up 25% of Devon's GVA.
- 23,000 students aged 18-24 years old in Plymouth - p14 Plymouth Report
- Proportion of 'Working Age' (15-64) population is 65.4% and this is higher than regionally in the Southwest (61.9%) and England more broadly at 64.5% - p14 Plymouth Report
- JOB INDUSTRY BREAKDOWN IN PLYMOUTH: 'Arts, Entertainment and Recreation in 2015 was 2500 jobs - p59 Plymouth Report
- Report does not contain mention of night-time economy, music venues or music. Culture is mentioned in relation to The Box (Plymouth History Centre)
- Visitor spend in Plymouth is worth £336m a year with a total of 4,965,000 visits in 2015 - p74
- Plymouth has the highest amount of day visits in the region at 4.2 million per year and the highest day visitor-spend at £169m. - p74
- 5.7% of 16 and 17 year olds are currently not in employment, education or training compared to 6% nationally: <http://www.dataplymouth.co.uk/economy>
- Plymouth is the 15th largest city in England with an economic output of 4.99 billion (2016): <http://www.dataplymouth.co.uk/economy>

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<sup>55</sup> [https://www.ukmusic.org/assets/general/Music\\_By\\_Numbers\\_2019\\_Report.pdf](https://www.ukmusic.org/assets/general/Music_By_Numbers_2019_Report.pdf)