

The Working Version of the

South West Music Forum Strategy

Unlocking Potential

March - July 2010

1. Foreword - Korda Marshall

It is my pleasure to introduce the strategy for the South West Music Forum.

We are currently experiencing enormous changes within the entire music industry which means that none of us can realistically predict where it will be in five, let alone twenty, years to come. File-sharing, quality of output, and most essentially commitment to long-term artist development are all playing their part in changing the landscape of the industry in a way that is more diverse and exciting than I have experienced in 30 years.

Live music has seen a rapid growth in recent years and despite the economic crisis remains the second favourite non-essential pastime of people in this country. It would seem that no matter what else is going on we all still love the experience you can only get from attending a live show, and, importantly this applies whatever cultural, creed or genre of music you subscribe to.

I have a strong bond with the South West, and an affinity that will keep bringing me back. I grew up in Cornwall, signed Muse a young 3-piece band from a small town in Devon and have seen them develop over a long period to be the first band to perform at the brand new Wembley Stadium over two sell-out shows.

It has been a pleasure for me to engage with the work of the BMF over the past few years and I am delighted to now be part of the working group for the future of the South West Music Forum, and a founder board member for a new development organisation for music in Music South West.

We have assembled a number of individuals with strong local knowledge and experience between them for this working group to look at all aspects of development for music in the South West, and we have all identified there is a huge gap in such provision. The South West is rich in its landscape, its landmarks, and its culture and in Glastonbury Festival the South West boasts possibly the single most important event in the international music calendar.

It is essential that we look ahead to the entrepreneurs and successful artists of the future and strive to ensure an environment in which they can grow and those working now can survive. This initiative will go some way towards achieving that, will provide real industry approved opportunities for grassroots music, and will begin to create a landscape that will benefit us all.

I strongly support this initiative and I urge you to do so.

Korda Marshall is the Managing Director of Infectious Records. Korda has spent 30 years working in the music industry in a career that has seen him as MD of Mushroom Infectious, East West, Atlantic and Warner Bros Records and sign and develop in addition to Muse a diverse range of artists including Ash, Garbage, James Blunt and Gnarls Barkley. Korda sits and has sat on several national industry boards including the British Record Industry Trust and the BPI Council.

For consideration - Matt Booth

We present this strategy following a significant period of work in the region since 2006 that has attempted to address the question, 'How can we provide a sustainable system to support an individual, group or organisation to gain reliable access to the national and international music industry no matter where they are in the South West?'

I doubt we have managed to answer that quite yet, but through the gathering and dedication of increasing numbers of like minds we feel confident enough to now make some commitments towards realising some of our main objectives in 2010.

However, we face uncertain times and the arts are again feeling the effect of cuts in spending and if we are to succeed we will need to be creative, determined, educated, informed and relevant. We will need to be prepared to think outside of accepted practice and keen to take ambitious strides forward. We have worked and continue to work to develop strong regional, national and international partnerships for the benefit of musicians and music businesses in the region, but we remain a considerable distance from realising our long-term goals. We hope this strategy will begin to guide us towards fixing that.

I would like to thank all concerned for responding to the strategy already, and Rob Jones for his leadership, vision and sheer hard work in pulling this together.

We hope that it will be of interest and inspiration to you and that you will feedback to us on it at all times. We are setting out our stall and we hope you will join us. At the very least, we aim genuinely to provide through this work an opportunity to work together to create increased and improved provision for music practitioners, and to unlock potential for all those working in music in the South West of England.

Matt Booth is co-founder and Chair of the Bristol Music Foundation.

2. Summary

This strategy focuses on music development in the South West of England, and the status and work of the regional music forums and the **South West Music Forum (SWMF)**. It aims to demonstrate how the local music forums can develop their work both individually and collectively to support the music industry in the South West. It aims to present a potential platform for collaborative working in music across the South West between business, public sector and education and offer sustainable links to the commercial music industry. The link to regional and national non-government, government and public sector strategy and policy will also be captured. It will endeavour to set out a vision for a new industry-led regional development organisation for musicians and music businesses that will support the SWMF and regional forums, and in turn provide sustainable paths to industry and artistic excellence for grassroots music in the region. *See Appendix A*

The local music forums are currently recognised as:

Bristol Music Foundation (BMF) and **Bristol Music Industry Forum (BMIF)**
Dorset Music Forum (DMF)
Gloucestershire Music Forum (GMF)
Somerset Music Hub (SMH)
Swindon Music Forum (SMF)
North Devon Music Forum (NDMF)
Exeter Music Industry Group (EMIG)
Plymouth Music Forum (PMF)
Cornwall Music Industry Forum (CMIF)

Also included is the newly developing forum in **Wiltshire**.

This document is part of a phased initiative to develop a robust strategy for the SWMF. Specifically it has the following timeline:

2009

Extensive consultations carried out across the South West on the direction of the Music Industry and associated opportunities for the South West Music Forum (SWMF), including meetings of regional forum representatives, and wider consultation meetings of individuals within the sector.

Consultation with regional and national government and non-governmental organisations.

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| July 2009 | Consultation workshop held in Taunton |
| Oct 2009 | Launch of Music To Market; An Online Survey of the Music Industry in the South West of England . |
| Nov 2009 | Music South West: 200 in attendance. <i>See separate report.</i>

First draft of the SWMF strategy sent out to working groups |

- Jan 2010** Comments discussed with various music forums and a 2nd draft strategy sent out for consultation to the working group
- First meeting of the industry working group in London
- Presentation to the **Federation of Music Services South West** annual conference in Torquay on the work of the Bristol Music Foundation, the regional forums and the SWMF and on the SWMF strategy.
- Feb 2010** Comments from consultations inform the next phase of the SWMF strategy. The document moves into a working version to be developed within a 4 to 5 month action plan. This plan to run from March 2010 – July 2010
- March 2010** Working version of the SWMF strategy, report on **Music To Market**, and details on the developing **Music South West website** launched in Bristol.
- Full working version sent out to working group and a much wider forum for consultation. Work to begin on developing a 3-year action plan.
- March to Jun** Research into all current and historical funding for music development in the South West and the allocation and use of public money.
- March / Apr** Mapping of potential funding resources and priorities linked to the development of the action plan with a view to resource emerging actions.
- April** Second meeting of industry working group to further discuss formation of new company for music development in the South West, **'Music South West'**, to continue lead work to date of the BMF and support the SWMF and regional music forums.
- April** Comments from consultation inform revised version of SWMF strategy.
- July** Final strategy and recommendations to be made.
- September** Formation of new lead company, presentation of all finance and funding proposals, and completion of 3-year plan.
- November** **Music South West 2010**: invitation to all participants and regional and national partners to Bristol for 2nd music convention. Presentation of full report and launch of 3-year plan.

3. Introduction

3.1. Historical background

Question? *How can we provide a sustainable system to support an individual, group or organisation to gain reliable access to the national and international music industry no matter where they are in the South West?*

The current level of operational activity of the South West Music Forum and the Bristol Music Foundation (BMF) originally emerged through development and historical support from other regions who saw the potential of seed funding that has proved a sound investment.

In 2006 the BMF began a project funded by Generator North East to encourage the development of music forums across the region in order to pursue an approach to regional support for music that would enable connections, collaborations and sharing of best practice.

Between April 2006 and now, the BMF has continued engagement with local authority arts officers, music businesses, educators and colleges, and other organisations across the South West in order to assess local provision of support for musicians and music businesses. This work has included advice on the establishment of local music forums and support and funding for such existing activity where necessary, and the provision of both regional and national specific perspectives for developing work within the local area.

The focus was, and remains, on grass roots support for musicians and music workers across the South West. It was, and is, on region-wide coverage and promotion of such support, the offer of ad-hoc advice and information to those requesting assistance, and the need to publish and disseminate practical information and models of good practice for the benefit of all musicians and music workers across the region.

The mission remains to bring real benefits to musicians and music workers in the South West over a long-term and sustained period by building an effective and viable model for on-going support work over a number of years.

Attention has been placed on nurturing individuals and groups and identifying, and addressing, areas of poor provision of support in the region, and seeking opportunities to help develop new links, networks, support organisations and other that lead to a more sustainable music sector.

In addition, this work contributes to the coherence of the economic impact of all music activity across the South West region, identifying strengths and gaps in music activity in the region and proving the economic value of the sub sector to regional agencies with the aim of securing project funding in the future.

In order to focus such activity in each local area, the BMF has assisted in the creation of represented bodies to assess and respond to the collective needs and interests of the music sector in each county, and to provide a coherent and well-organised lobby for increased funding and investment into the sector.

Business Case and Sector Development Plan Feb 2008

In Feb 2008, the BMF published a report entitled 'SWMF: Business Case and Sector Development Plan'. This report was written by the BMF with the Burns Owens Partnership and funded by Culture South West.

The report set out an approach to developing a South West Music Forum in line with regional Creative Industries sector activity led by Culture South West, and in response to the national Creative Economy Programme 2005, and the regional Creative Industries Collaborations 2007.

The report outlined the benefits of a SWMF and identified three key areas of development work: mapping of the sector, skills development, and international and export activity.

The report brought music and the SWMF in line with Culture SW CI Development activity in the region, with design and craft, and unlocked seed funding.

Subsequent to this, the report also engaged music and the SWMF via the BMF with the South West Regional Development Agency Creative Industries Strategy 2008 – 2011 and their Cluster Development Programme with the media and design sectors.

Funding for the further development of the SWMF and the regional forums followed from July 2008 as part of this programme.

In Feb 2009 the representatives of all music forums met in Bristol and Terms of Reference for a South West Music Forum were agreed. *See Appendix C.*

In June 2009 the Cluster Development Programme came to an end. The SWMF continues to engage with the South West RDA and partners via the BMF.

On 14th July 2009 representatives from the sector met in Taunton to discuss the work to date of the SWMF. The most popular development identified at the meeting by those present was to establish a regional website for music that would build on that of the BMF, and a regional organisation that would also build on the work to date of the BMF and support the regional forums and the SWMF.

The establishment of this SWMF strategy provides an essential process for further development of the SWMF and an approach to such development that assesses and identifies all potential income streams and ensures a move away from any dependency on public sector funding. It provides an unrivalled opportunity to develop a 'gateway' to the region for the national and international music industry for the benefit of all practitioners, and a clear advocacy for inward investment.

3.2. Who is this strategy for and who did we consult

On 14th July 2009 Somerset County Council hosted a regional consultation workshop in Taunton on the direction of the music industry in the South West. The workshop provided initial feedback on the need for and direction of a strategy for the South West Music Forum.

This was then taken forward at Music South West in Bristol on 11th and 12th November 2009.

Overall four working groups are in place to support this strategy:

I. A core working group, led by Rob Jones at Somerset County Council, Helen Miah at Swindon Borough Council, Cindy Dalglish at Plymouth City Development Company and Kath Wynne at Plymouth City Council. This group will consult more widely with Devon County Council, Bristol City Council, South Wiltshire Economic Partnership, Cornwall Council, Gloucestershire County Council and Dorset County Council.

II. The South West Music Forum members and individual forums including the BMF, Dorset Music Forum, Gloucestershire Music Forum, Somerset Music Hub, Swindon Music Forum, North Devon Music Forum, Exeter Music Industry Group, Plymouth Music Forum, Cornwall Music Industry Forum and representatives from Wiltshire.

III. The Federation of Music Services South West

IIII. An industry working group comprising Matt Booth, Korda Marshall, Chris Morrison, Martin Elbourne, Ajax Scott, Andrew Gummer, Ben Challis, Leon Alexander, Bev Allen, John Empson and Seth Jackson.

This group first met in London on 20th January 2010.

Expressions of interest have also been received from businesses within live music, live events and technical theatre in the region in establishing a regional employers group to support assessing qualifications and training for industry and responding to national initiatives such as the National Skills Academy and Creative Apprenticeships.

The Bristol Music Foundation launched a survey in October 2009, '**Music To Market**', that asked questions on all key aspects of company and individual activity, turnover, and development and training needs. This survey has acted as an initial region-wide public consultation.

Further details on current activity, and an explanation of what each member of the working group, along with other partners, are currently doing to support the industry will be made available via the Music South West website. Each partner will have their own section to showcase their own activities.

The BMF hosted the first '**Music South West**' convention at the Watershed in Bristol on 11th and 12th November 2009. 200 people attended. *See separate report.*

The BMF invited national partners to Music South West to discuss their own work in relation to that of the BMF, SWMF and regional partners.

National Partners at Music South West included **Creative & Cultural Skills** and the **National Skills Academy for Creative & Cultural Skills, Julie's Bicycle, UK Music, PRS For Music, The Association of Independent Music, Generator, We:Live, A Greener Festival** and the **BRIT School**.

Discussions at the consultation in Taunton and at Music South West clearly identified the need and demand for a strategic approach to assessing and planning sustainable development provision for musicians and music businesses across the South West.

The BMF met with the **DCMS** on 21st January 2010 to discuss the strategy.

The BMF met with the **South West Regional Development Agency** on 23rd February 2010 to discuss the strategy.

The BMF met with **South West Screen** on 23rd February 2010 to discuss the strategy.

The BMF met with **UK Trade & Investment South West** on 29th January and 23rd February 2010 to discuss the strategy.

The BMF met with **Business Link** on 24th February 2010 to discuss the strategy.

The BMF met with **Creative & Cultural Skills** and the Chair and Managing Director of the **National Skills Academy for Creative & Cultural Skills** on 25th February 2010 to discuss the strategy.

The BMF inputted into the **UK Music 'Redefining the Music Industry'** consultation in October 2009 as part of ongoing consultation with UK Music.

The Arts Council SW provided comments via email on the strategy on 25th February.

The entirety of this work will be made available in an on-line format on the Music South West website. This allows continued amendments and updates to be made, ensuring this strategy is always up-to-date and adapting to the changing needs of the industry. An online approach also makes this work sustainable and allows the showcasing of case studies and examples of good practice to a much wider audience. *See Section 5.*

The work developed here makes recommendations on the next phase of collaborative music development in the region. It is aimed specifically at the regional forums, public sector and charitable organisations, individuals, artists, educational services practitioners, businesses, suppliers, local authorities, and national partners with an interest in developing the industry and anyone associated with any form of music within the South West.

3.3. What do we mean by the music industry

For clarity, throughout this work the term 'music industry' refers to all areas of music from Drum and Bass to Folk - Rock to Opera and so on. The term Music Service refers to all areas of education as delivered by the county music education services.

The industry is the widest reaching of the UK's creative industries, covering an ever growing remit of genres and forms. However despite bringing in over £6 billion to the UK's Gross Domestic Product, the industry is often miss-understood and lacks a consistent support network and recognised representation.

The industry is one of the few in the UK that can boast an education and community provision that fits firmly alongside the commercial industry sector. Areas such as corporate business, recording and broadcast companies, sales – both import and export, teaching and engineering are all closely linked, and directly benefit each other.

The Music South West website will host many examples of such synergy, one example being in Gloucestershire where the education sector, through Gloucestershire Music, is the biggest county employer.

In many counties viable commercial industry is only achievable through networks outside of the county and internal efforts to improve the links and quality of education and community provision. The music industry is often capable of delivering such activities with comparable ease.

To gain a grasp of the size and reach of the industry we need to look at some figures. Nationally we can summarise the impact of the UK's music industry as:

- Employs over 130,000 full time equivalent employees

- The third largest industry in the UK by export
- Has the third largest global market for music
- Four of Top Ten global sellers in 2008 were all from the UK
- The UK has over 2,000 record companies and over 1,000 professional record producers working with over 300 professional recording studios

Regarding sales figures we find

152.7m singles sold in the UK in 2009 which is a 32.7% increase from 2008. Of these 98% were downloads. There were 128.9m albums sold in the UK during 2009 of which 16.1m album were downloads¹.

One of the biggest economic benefits is found through festivals, venues and local pubs that support live music.

Each year throughout the UK thousands of festivals and other live music events take place. All bringing significant economic and social benefits to local areas.

²In an overreaching survey of 3,300 festival goers undertaken by the Association of Independent Festivals (AIF) found that with AIF member festivals alone, which include Secret Garden Party, WOMAD and Glade, visitor numbers were around 340,000 people in 2009. Spending an average £408 per person, they contributed in excess of £135 million into the UK economy.

With 60% of festival goers staying for 3–4 days in the area surrounding the festival, spending on average £48 each, an additional £16.3 million was directly inputted into local economies.

Ranging in size from Glasgowbury at just 1,000 people to Creamfields with over 40,000, AIF's 19 member festivals generate on average £1million each for local towns and businesses. Bestival making £600,000 for ferry companies alone each year, and the non-camping festival Evolution estimated to boost the economy of the twin cities of Newcastle and Gateshead by £2.9 million.

With over 300 AIF festivals alone having taken place in the UK during 2009, the total amount of revenue generated across the whole festival landscape for local businesses is projected to be staggering.

Within the South West this figure is especially high, as many local areas support a number of festivals and events that support live music. Somerset is no exception. Glastonbury Festival generated £73 million in income in 2007, with £25.6 million spent on site and £26.5 million spent offsite in the local area³. The GVA can be valued at over £200 million. This has seen an increase year on year linked to increased capacity and spend.

Glastonbury is the largest annual outdoor broadcast event for the BBC.

Link this into the hundreds of other festivals and live music events in Somerset and the county often attracts many hundreds of thousands of visitors annually.

¹ Official Charts Company Jan 2010

² Extract taken from the AIF website <http://www.aiforg.com/index.php>

³ Mendip District Council report April 2008

Venues also play a critical role in supporting live music, with locations such as The Orange Box in Yeovil and the Perfect 5th in Taunton, typical of the highly effective yet smaller capacity centres, to the larger centres such as O2 Academy Bristol and Plymouth Pavilions. If we combined the visitor numbers and economic impact these all have, the results would be considerable.

Regionally the South West has a number of specialised agencies that bring opportunities to the music industry through a range of means. Organisations such as Folk South West and Orchestra South West bring in many thousands of visitors each year to live performances, and are often leading the way in championing support for their relevant sector. Commercial activities such as concerts and live music in local pubs all factor into the immense economic and social benefits music brings.

It is our intention to have all of this information kept constantly up to date on the new Music South West website.

3.4. An Industry Perspective for the South West

Music To Market: A Survey of the Music Industry in the South West of England

In October 2009, the BMF launched an online survey of the music industry in the South West. **'Music To Market'** has not only served as the wider public consultation for the strategy, but also acts to inform local and regional activities – ensuring the hubs and SWMF are responding to the true needs of the industry.

The survey is the first stage of the mapping of the music industry as identified in 'The SWMF: Business Case and Sector Development Plan' to identify activity and economic impact across all links in the supply chain and provide evidence to begin to unblock barriers to business and professional growth.

The survey has so far attracted **160** responses, most of which have been from individuals and businesses involved in the music industry. Some of the findings are summarised as follows:

- 92% wish to see a music development agency for SW music
- 68% would pay for such an organisation.

All respondents agreed that new business and making new contacts was important to them. It was also seen by all that a music development agency could provide a range of services. The most important being:

- 87.8% would like more Networking
- 74.4% would like more Events
- 73.3% would like further Training Information / News dissemination

69.4% felt that the industry should be more closely involved in skills development and training, with 70.0% suggesting a need for new, affordable rehearsal facilities to be set up in local areas. These could be existing centres that are adapted to co-locate support services to the creative industries.

Regarding sales, half of all respondents gain their main income from working in the industry. All participants that sell their music use iTunes as a way to sell their work, with many using MySpace as their primary web presence. Most artists find using independent retailers more acceptable than the main high street dealers, mainly due to retail mark up of goods being higher in the bigger chain stores.

88.9% of all respondents agreed that an online promotion and retail facility specifically for the South West music industry would be very beneficial, and they would use the service.

On the wider business side of the industry

59.0% would you be willing to take part in a carbon and waste audit of the music industry in the South West

42.6% felt that they have a working relationship with their local authority, but often clarity as to who to speak to was found to be difficult

60% do not believe that government agencies and funders have helped develop the music industry in the region.

Over 70% of all respondents receive no public sector funding of any kind.

Please see separate report.

The survey provides clear information on individuals and businesses working in music in the region and when linked currently to individual profiles on the BMF website provides a clear route to focused development and to providing relevant links to regional, national and international training, events, missions and programmes.

The report will be made available on the Music South West website and we intend to re-launch the survey with the new website in order to maintain needs assessment of all members working in music in the region and link to member profiles.

4. Setting the scene – the here and now

4.1. The Strategic Context

There are three main levels of partnership working which set the strategic context for the SWMF: national, regional and county wide. During the period of March to July 2010 this area will be expanded to cover the key industry partners and their priorities – showing how the SWMF fits with these aims and identifies ways of supporting existing strategic effort.

4.1.1. National

Nationally the Department of Culture, Media and Sport (DCMS) provides guidance on government policy and requirements. They have often outlined the music industry as being one of the main contributors to cultural activity across the South West. Music is identified in national strategies such as:

- Creative Britain – New Talents for the New Economy
- DCMS Changing Lives and Places 2007 – The lessons from the cultural Pathfinders
- Digital Britain
- Youth Music – National Strategic goals around Encouraging Musical Talent and Potential – Due to be completed in mid 2010
- Creative & Cultural Skills – Creative Blueprint
- UK Music – Redefining The Music Industry / Liberating Creativity

Recent government policies have focused on the increasing need for improvements in support to the UK's Creative Industries. Many feel this sector is leading the economic recovery. The music industry fits squarely into this activity by presenting significant opportunities for local businesses via festivals and events, championing local venues and rural pubs and leading an increase in digital sales year on year.

This has been accompanied by an increasing awareness of the importance of creativity both in terms of its contribution to health and wellbeing, economic prosperity, and its importance to the welfare of the local economy.

Accordingly there has been an increased emphasis on the need for a more strategic approach to the delivery of services that involve music, such as:

- Improvements in the offer of music education in schools, and an ambition to modernise music programmes under the national curriculum
- More regular use of music to aid health and well being through dance programmes and other related activities, as well as further developments in the use of music to assist people with learning difficulties and mental health needs
- Improved access to careers within the industry and a wider understanding of the many jobs available
- Improvements in business support open to the industry

Music is also recognised in a wide range of regional, county and district cultural strategies and action plans across the UK.

Other nationally led music educational activities that the SWMF aligns itself with are:

The wider opportunities at Key Stage 2 linked to the Department of Children, Schools and Families Aspirations Document

Music Manifesto –

Musical Futures – www.musicalfutures.org

Trinity Guildhall and The Open University programmes – Perform and Tune In – www.ks2music.org.uk

The Qualifications and Curriculum Development Agency National Qualifications Framework – www.qcda.gov.uk

The Associated Board of the Royal Schools of Music – www.abrsm.org

Every Child Matters – www.everychildmatters.gov.uk

Youth Matters – www.youthmatters.info

4.1.2. The 2012 Olympic and Paralympics games

One significant development for all is the 2012 Olympic and Paralympic games. This offers major opportunities on all levels of working. Both the BMF and SWMF will become heavily engaged in cultural and creative activities running up to 2012. Already opportunities are appearing for the local forums and more will follow. Full details of these will appear on the Music South West website.

The BMF is also a member of the South West Cultural Olympiad Task and Finish Group, supporting the South West Regional Programmer.

4.1.3. Regional

All regional strategies, such as the regional spatial and economic strategies, must now be developed within the context of *Just Connect* - the Integrated Regional Strategy for the South West.

Just Connect focuses on five headline aims for the South West:

Its headline aims are:

- to harness the benefits of population growth and manage the implications of population change
- to enhance our distinctive environments and the quality and diversity of our cultural life
- to enhance our economic prosperity and quality of employment opportunity
- to address deprivation and disadvantage to reduce significant intra-regional inequalities
- to make sure that people are treated fairly and can participate fully in society

The new Regional Cultural Strategy *A Better Place To Be* focuses on five outcomes that relate to the headline aims in *Just Connect*.

It includes a process through which these outcomes can be achieved through a number of joint programmes including:

- People, Places and Spaces (a cultural infrastructure development strategy)
- Cultural Olympiad (a four year cultural programme to celebrate the London 2012 Games)
- Culture Module (a joint cultural research strategy to evidence the importance of culture)
- The Creative Economy (a strategy to support development of creative industries)
- Cultural Improvement with Local Authorities (a toolkit to improve performance management)
- Advocacy and Cross Sector Capability Building (improving capacity to engage with priorities in other sectors)
- Youth Music – National Strategic goals around Encouraging Musical Talent and Potential

Together with the Regional Spatial Strategy (which identifies where growth of housing, employment land and transport infrastructure will be needed) and the Regional Economic Strategy (which identifies the priorities for improving economic prosperity) these regional documents provide an important context for the development of the SWMF strategy, as they identify where the regional priorities are, and therefore where any associated funding is likely to be targeted.

4.1.4. County-wide

The strength of the SWMF sits firmly with its wide base of local partners, who, as well as supporting the activities of the regional body, also undertake their own activities. Such work is very widespread, details of these will be found on the Music South West website as well as visiting the various web pages for each individual forum.

The current **regional music forums** are;

Bristol Music Foundation (**BMF**) and Bristol Music Industry Forum (**BMIF**)

Dorset Music Forum (**DMF**)

Gloucestershire Music Forum (**GMF**)

Somerset Music Hub (**SMH**)

Swindon Music Forum (**SMF**)

North Devon Music Forum (**NDMF**)

Exeter Music Industry Group (**EMIG**)

Plymouth Music Forum (**PMF**)

Cornwall Music Industry Forum (**CMIF**)

They will soon be joined by a forum in **Wiltshire**.

The SWMF and sub-regional forums are now recognised in cultural strategies in local authorities in Swindon, Somerset, Gloucester and Cornwall.

4.2. Examples of activity of the forums to date

Bristol Music Foundation

Activity as above plus:

- Developed regional partnership with UK Trade & Investment South West to support export and international trading for South West music practitioners.
- Built partnerships with international trade events including SXSW, The Great Escape, Canadian Music Week, and Midem.
 - Since 2006 over 50 musicians and businesses supported.
 - Over £100,000 in grants allocated.
 - Over £2 million in GVA identified.
- Built relationships with national industry trade bodies.
- Engaged with national programmes including the National Skills Academy.
- Raised funding to develop the BMF website to provide member profiles for SW practitioners, plus news, resources and dissemination of information.
- Devised and ran *Music South West* a new annual music convention for South West music with national and international relevance.
- Devised and ran the *Teenage Rampage* programme to identify, support, develop and network young under-19 musicians and young people in the South West.
- Delivered an ongoing series of training workshops and seminars on professional music industry practice with guest speakers including International Music Management, and Publishing, Copyright & IP – www.musicindustryeducation.net

A full report on the activity of the BMF including all income and distribution of funding will be published ahead of the end of the company's financial year in August 2010.

The Bristol Music Industry Forum is currently being restructured and will re-launch in the summer of 2010 with a new steering group including local industry representatives administered by the BMF.

Dorset Music Forum

- Organised and ran the 'Sun, Sea, Sound' event at Bournemouth International Centre
- Over 100 in attendance. Acted as the wider consultation for a Dorset Music Forum.
- Built the Dorset Music Forum website as a resource for local musicians and music businesses – www.dorsetmusic.com
- Built local partnerships with the local authorities, formal and non-formal educators and local FE and HE colleges, and local businesses including the Bournemouth O2 Academy (formally the Opera House) and Bournemouth International Centre
- Converted a disused shop on Boscombe High St in an area in need of regeneration into the DMF HQ.
- Ran a series of Industry Insights sessions to provide key training and education for local musicians and businesses.
- Co-ran *Bristol To Brighton* the South West at the Great Escape 2009 with the BMF.
- Developed and ran the *Dorset Music Awards* to provide aspiration for local musicians.
- Developed the *DMF Choir* which has seen a significant number of regular participants from the local area.
- Developed *DMF Juniors* – after school music workshops for young people.
- Currently developing rehearsal spaces at the DMF HQ to benefit local musicians.

Gloucestershire Music Forum

- A unique partnership of Gloucestershire Music Service, Gloucester Guildhall, University of Gloucester, Gloucestershire College, and Wired.
- Commissioned research into music activity in young people in Gloucester central area.
- Report 'Youth Music In Gloucester Nov 2007 to Feb 2008' published.
- Phase 2 report, 'Youth Music In Gloucestershire April to Dec 2008' published.
- Awarded funding by the Arts Advisory Group at Gloucestershire County Council post the reports.
- Created District Music Officer posts to link music makers together and to initiate and support established projects in the 6 districts of the county.
- Launched GMF website.
- All activity available on the website - www.gloucestershiremusicfoum.com

Swindon Music Forum

- Part of Swindon Borough Council cultural strategy, 'Swindon Does Arts'
- Full and constant update of music relevant activity on website www.swindondoesarts.co.uk
- Co-organised BBC Radio 1's 'Big Weekend' in Swindon May 2009
- Organised the biggest outreach programme to accompany a 'Big Weekend' event
- Worked with young people to document the event
- Organised secret Radio 1 show in a Swindon school featuring JLS and Ironik
- Organised the 'Big Weekend' Fringe event with BBC Introducing
- Supported 16 local acts through the event
- Swindon Does Arts leading on the Big Village Fete at Lydiad Park, Swindon July 2010 with Swindon Music Forum
- Part of legacy from Radio 1's Big Weekend
- SMF programming Dance and Youth Music Tents and the Main Stage
- Run the *Swindon Shuffle* in August each year
- 60 acts over 4 days on 11 stages
- Organise *Swindon Invincible* each year. Biggest dance music festival in Wiltshire.
- Support Swindon Music Service Battle of the Bands

Somerset Music Hub

- Launched website www.somersetmusicclub.com
- Organised *The Sound of Somerset* Nov 2009 supported by the local authorities
- One-day festival for local music in Taunton town centre
- Over 20 local acts performed in Taunton
- Ran 5 music workshops
- Distributed 1,000 compilation *Sound of Somerset* CD's of local music
- CD curated by John Parish (PJ Harvey)
- Worked with local venues, business, the local authorities, and local schools and colleges

Exeter Music Industry Group

- Published initial research, 'Youth Music in Exeter' in 2009
- Carried out additional desk based research on the music sector in Exeter and East and Mid Devon from July 2008
- Co-organised and ran the 'Analogue to Digital Music Expo' at Exeter Phoenix in March 2009 with Sound Gallery
- Single biggest event in the South West for professional music equipment and technology
- Gave away £5,000 in prizes
- Over 400 in attendance
- Staging 'Analogue to Digital Music Expo 2010' at Exeter Phoenix on 6th March

Cornwall Music Industry Forum

- Hosted seminars with Music Producers Dennis Smith and John Cornwell from Sawmills Studios
- Hosted an “Open Space” event for consulting with music businesses and practitioners and arranged mentoring sessions for bands from industry professionals

Please see the Music South West website for full details of each forum's terms of reference and details of current activities.

Since 2006, extensive consultation has taken place in the region, through the hubs or via regional activity. Open meetings have been held in Bristol, Gloucester, Swindon, Somerset, Dorset, Plymouth, Exeter and Cornwall specifically with a view to establishing a local music forum in each area.

We aim to move forward historic and ongoing work towards developing credible ways of the commercial music industry, including musicians, from grassroots upwards attracting support from public funders and private investors, particularly in the areas of skills, business support and enterprise.

We aim through the establishment of the SWMF in the long-term to give the music sector within all sub-regional areas, and the South West as a whole, a clear and active voice on regional and national governmental and music industry fora and an opportunity to influence national music agendas and policy making, and to establish a solid link to the music policy unit at the DCMS, to Creative and Cultural Skills, UKTI, the British Phonographic Industry and similar national governmental and non-governmental organisations and trade bodies.

5. Music South West website www.musicsouthwest.com

A new website is now being developed that will support the work of the South West Music Forum and build on that of the Bristol Music Foundation. The site will be linked to this strategy, and hold details on all the consultation work, and its appendix, as well as provide links to all partners.

The site was funded through European Union funding via GWE Business West and UK Trade & Investment.

The website will act as an online platform for the music community in the South West, powered by Musicosity, that will provide member profile facilities for all music practitioners working at all levels in the region. The site also allows the creation of groups, networks and private member's areas. *See Appendix B.*

The website will contain toolkits on all aspects of the music industry, and on regional music support programmes such as export and international trade missions, CPD, and using digital networks. The toolkits will link directly to all workshops, seminars, and training courses. The website will have a region-wide focus, and link to and directly support the activity of all regional music forums.

It will also provide a point of focus for SWMF activity, including a network of venues and promoters to support improved opportunities for musicians.

The site will be promoted to a national and international market place via new and existing partnerships, attendance at events, and direct marketing. Advanced online analytics will be made available to all members.

The Music South west website will enhance this strategy significantly by expanding on much of the work within this strategy. Such expansion includes:

5.1. The educational benefits of music

- Music services
- An overview of the formal education sector
- An overview of the non-formal education sector
- Progression routes – how do these work now and where are the gaps?

5.2. The business opportunities of music

- Including venues, recording studios, promoters, distributors, music videos, instrument makers, retailers, music technology companies, publishers, record labels.

5.3. Skills

- CPD and training for all practitioners in all areas including performance and business management.
- Links to regional and national skills programmes
- Links to Business Link and partner agencies

5.4. International

- All export and international development programmes with UK Trade & Investment South West
- All national programmes and trade missions
- All funding opportunities for international development
- All training opportunities for international development

5.5. Communities and Music

- Shows the community benefits to music and covers festivals in detail
- Extended schools programme
- Family learning
- Sing Up the Music Manifesto national singing programme
- Intergenerational working through all forms of music

5.6. The Artist's point of view

- Music To Market outcomes
- The continuation of the Music To Market survey linked to member profiles
- Further develop relevant national relations and partnerships including PRS for Music, PRS Foundation, and the Featured Artists Coalition.

5.7. New technologies

- Digital

- South West Connected

a proposed project to educate practitioners in the region on how best to use the Music South West website, plus current social networking platforms, digital retail and marketing, data and consumer analytics, and direct to consumer revenue in line with current and developing industry practice.

5.8. Sustainability

- Further develop the partnership with Julie's Bicycle
- Embed and link to Julie's Bicycle toolkits and carbon audits within website
- Develop programmes for carbon and waste reduction with Julie's Bicycle, AGreenerFestival and regional partners, feature on website and link to members

5.9. The case studies

- Case studies included all have relevance to the particular aims and objectives of this strategy, and include examples of good practice

The website is currently being developed. A first phase launch will take place by July 2010, with the website fully operational by September 2010.

6. The Actions of the Working Version of the South West Music Forum strategy March – July 2010

The following actions are for the period March to July 2010 and are designed to shape and develop the SWMF strategy. Critical to the success of this work is the fit with existing activity, and the ability of the SWMF to complement and strengthen the industry across the region and nationally. At all times the focus is on developing the SWMF aims to fit with current priorities within the South West.

Once completed in July 2010 the SWMF strategy will be distributed and first actions acted upon. When ready, the strategy will be hosted on the Music South West website and form an integral part of regional activity. The action plan will have a three year time scale and have clear SMART targets.

The current actions for the period March – July 2010 are therefore summarised as:

- Immediately identify all initial funding and income opportunities to support the development of the strategy and 3-year plan.
- This to include improved research of the sector in the region including activity, needs, turnover and economic impact. The re-launch and marketing of *Music To Market* to be included as part of this.
- Develop a clear and tangible 3-year action plan for the SWMF. Such a plan is to be developed with SMART targets and include a clear guide to who will benefit

from this work, and what will be expected of them over the 3-year period of the plan.

- Identify the South West's main partnerships and funders for the industry and involve them within the emerging SWMF strategy 3-year action plan. Ensure actions and direction of strategy fits within their current aims and priorities for the region and identify any gaps the SWMF can close.
- Develop the SWMF working strategy to become more specific and relevant to the work of the organisation, with a clear focus to what's already available in the South West, and its overall fit within the national arena.
- Explore current supply chain for the industry in the South West, and determine options on how the SWMF approach with the regional music forums engages all links in the supply chain.
- Determine any key blockages and barriers to growth by using the findings of the Music To Market survey and linked local mapping exercises and information provided through the local forums.
- Through consultation and links with regional and national partners, the importance of digital and new industry focused technologies will be explored. Examples of good practice found and used to encourage modernisation of the industry within the South West.
- Further linkages to be made with the Federation of Music Services, to ensure the SWMF meets expectations and supports educational and skills needs within the South West. The use of the forums to help encourage industry participation within local education services could be one avenue
- Support the development of the Music South West website by identifying gaps within the industry that the site could fill. Areas such as dissemination of good ideas and dissemination of national information, hosting of industry toolkits, information on funding and locations of venues and rehearsal space.
- Disseminate examples of good practise such as the South West New Writers Network, Teenage Rampage, Rural Touring schemes, Folk South West, the 'Youth Music in Gloucester' reports, the Analogue to Digital Music Expo, and other sector networks including media and design.
- Improve engagement with the London 2012 Cultural Olympiad.
- Develop better links with the live music and festivals scene in the South West as a way to aid the promotion of local music. Find best practise methods of engagement and utilize regional activities such as the South West Out Doors Events Forum.

The above actions will align with the development of a new industry led company to continue the engagement and strategic work of the BMF and support the ongoing and future activity of the SWMF and regional forums. *See Appendix A.*

Appendix A

'Music South West'

Outline of proposal for business plan at Feb 2010

Introduction

Following the Music South West convention run by the Bristol Music Foundation in November 2009, a working group was assembled to support the strategy for the South West Music Forum (SWMF) and assess options on the creation of a new regional music development organisation for the South West of England.

The first meeting of this group was held in London on 20th January 2010.

The SWMF strategy is being led by the Head of Cultural Strategy at Somerset County Council, and is supported by heads of arts and culture in most councils in the region. A first phase of the strategy will be published on 3rd March 2010, and this will be followed by a period of work to September 2010 to establish the best approach to a sustainable organisation for music development in the region. The outcome will be presented at the next Music South West convention to be held in Bristol in November 2010.

A separate public consultation, 'Music To Market', was run and findings from that consultation and the wider consultation for the SWMF strategy have already clearly demonstrated a widely held desire for improved provision of development work for musicians and music businesses in the region.

92% agree that the South West needs a music development agency.

67% would pay for membership of such an organisation.

Next Steps

Governance and structure

It is hereby proposed that the structure of a new lead organisation would be as follows:

(A) Music South West – The lead organisation that comprises of a strategy board comprising of no more than 15 individuals from the music industry, plus individuals from the private and government sector relevant to delivering the aims of the board. Roles of the strategy board will be to discuss all key issues relating to approaches to sustainable music development in the South West consistent with current national and international industry, and agree vision, outcomes and objectives over a one to three year period for the organisation. Board to comprise of high-level individuals with links to the South West, and at least one representative from the South West Music Forum.

Text removed.

A policy board comprising of a small group of individuals based in the South West, approved by the strategy board, will lead and manage the organisation and will implement the outcomes and objectives of the strategy board.

Responsibilities of the policy board:

- Establish and implement the organisation's purpose.
- Set the rate of progress the organisation will undertake in achieving its mission.
- Provide continuity for the governance and management of the organisation's affairs.
- Confirm the organisation's identity within the community.

The policy board could include a representative from the public sector in the South West such as Business Link.

(B) The South West Music Forum (SWMF) – the network of regional music forums, comprising of the Chairs of each music forum, that meets quarterly and provides a platform for delivery in each county and local area of the objectives of the strategy board as directed by the policy board, and represents at all times the expressed needs of each local forum member.

The SWMF, and member forums, will maintain close local contact with all regional partners including the music services and local authority arts officers.

(C) Members – membership to have two structures: 1. Local membership of a regional music forum, e.g. www.dorsetmusic.com. 2. Region-wide membership of *Music South West* via a profile on the *Music South West* website.

(D) Friends / Patrons of Music South West – to be individuals, generally senior professionals such as musicians, that support the aims and objectives of the organisation and provide expertise, guidance or funding and may become at some point members of the strategy board.

Finally, consideration must be given to *Music South West* being constituted as a Trust with charitable status and a Board of Trustees replacing the strategy board.

Aims

To be agreed.

Provisional examples:

- Support the development of music businesses and musicians in Bristol and the South West.
- Raise the profitability and international profile of the music industry in the South West.
- Provide commercial and performance progression routes for talented young music makers and a link for young people to genuine mainstream commercial industry expertise.
- Develop and maintain a strong and close relationship with central government and the Department of Culture, Media and Sport, the Arts Council, Business Link and other government and creative agencies and policy makers in order to influence national policy and lobby directly for investment into music in the region via *Music South West*.
- Act as a funding body for South West music.

Income

Five points of income:

1. Private income from Friends or Patrons
2. Membership fees
3. Commercial income – e.g. events, training, consultancy
4. Sponsorship and corporate investment
5. Public sector income – e.g. the Arts Council

Evidence and advocacy

What we have:

- Music To Market consultation results – 160 music practitioners in South West feeding back on most aspects of business development need.
- SWMF strategy consultation – including council arts officers
- BMF website – 175 member profiles
- £7k to build new *Music South West* website as an online web community for music practitioners in the region and house the final SWMF strategy and objectives of the *Music South West* strategy board.

What we need:

- A further £7 to £10k to complete the *Music South West* website.
- A comprehensive consultation with music practitioners in the region over a 3 to 6 month period, plus a report to be written on the economic impact of music in the South West.
- Approx £15k to employ an external economic or creative consultant to carry out a full activity and economic impact study and compile a comprehensive report.
- A business plan based on the findings to support the regional music forums and the *South West Music Forum*, and inform the objectives of the *Music South West* strategy board.
- Consideration of a carbon and waste audit of South West music businesses, and an environment and social impact study. BMF currently has a £10k bid for such with University of West of England and Julie's Bicycle in at the EU.

Possible Activity of the Music South West organisation

Education and Young People

Core initial aim of *Music, Young People, and Technology*

Create a separate company that raises investment with *Music South West*, and carries out *Music South West* objectives relating specifically to young people.

The company to include a committee of young people selected from within the region. To run programmes for young people in the region in partnership with schools, music services, and community music organisations.

Create a programme of skills development for young people, and include education on sustainability, the environment, and social inclusion.

To bid at a high level for funding for national projects for youth.

Other Departments

International Development

Building on the work to date of the BMF with UK Trade & Investment South West that has seen over 50 businesses assisted in international development and over £100,000 in grants allocated.

Maintaining and developing showcases and South West delegation at international conferences and events including SXSW, Great Escape, Sonar, Midem and Womex.

Business and skills development

To maintain a regional partnership with Business Link, and support skills and business development in music businesses and organisations in the region.

To lead on skills development programmes for music and build the regional employers group.

Digital

Maintain a key focus of *Music South West* on digital within industry including social networking, online marketing and retail, data analysis, and direct to fan revenue.

South West Connected – programme to educate music businesses and practitioners in the region on how best to use the *Music South West* online community website run in line with updates on all key activity and developments in digital industry and how best to maximise engagement with online and digital.

Film & TV

Network of composers for film, TV, ad's and consumer brands.

Department to focus on:

- Budget high quality video making opportunities for South West artists via accessing young and college based filmmakers and editors.
- Business contacts with national and international music supervisors and sync agents.
- Organising missions to national and international sync and licensing conferences and events.

Live

- Support the development of best performance opportunities for South West artists.
- Support the development of local independent venues and promoters by negotiating contacts and relationships with national agents and managers, and assigning funding for venue and festival development where required.
- Develop the *South West Regional Employers* group as the network of live music employers and link it to national programmes and organisations including Association of Independent Festivals.

Funding

To run all *Music South West* funding programmes, offer advice and guidance, assess all applications, and assign all funding.

Staff

Budget

Text removed.

Appendix B

Music South West new website

Objective

- Member profiles
- Support ongoing development and community engagement
- Helping consumer discover more live music in the south west
- Communications platform for industry & consumer
- Audience development tools for artists & businesses
- Shared resource to assist career development
- Training toolkits & industry information / directory
- Deliver value to stakeholders & community

Features

- Event listings and ticketing
- Member profiles
- Artists, manager, promoter, venue etc
- Provides a comprehensive directory
- Assists mapping of music industry
- Audiences & groups
- Manage & track audiences
- Communication tools
- Internal & external messaging (interface with other social networks)
- Surveys, polls & multimedia

Industry Benefits

- Improved Visibility Of The Industry
- Shared Resources
- Audience Development
- Marketing Tools
- Low Cost
- Foundation For Demand Intelligence

Consumer Benefits

- Improved Access To Live Music Info
- Trusted & Comprehensive
- Non Intrusive - Control Of Messaging - Less Spam
- Discover New Artists
- Personal Calendar
- Publish Reviews & Stories

Appendix C

South West Music Forum

Proposed Terms of Reference at Feb 09

Aim

To support the continued growth and development of the music industry in the South West of England.

1 Operation

The function of the forum is:

- To provide a regional proactive voice for the music industry in the region.
- To provide a focus for the strategic development of the sector within the region.
- To provide a regional network for music practitioners in the region.
- To strengthen communication and develop partnerships in the sector.
- To provide a platform for joined up activity, and (dynamic and groundbreaking) projects that will have an impact regionally, nationally and internationally.
- To support a sustainable and strategic link between the industry and education.
- To promote the music industry of the region nationally and internationally.
- To demonstrate the economic, social and cultural benefit of the industry at all times.
- To provide collaborative support to regional music projects in development.
- To provide a single, united and independent voice to support lobbying for greater investment into the music industry in the region.
- To comment and feedback on regional and national agendas, papers and strategies.
- To link the music industry in the region with regional, national and international initiatives and organisations.
- To disseminate relevant information to the sector at all times.

2 Meetings

Quarterly at dates fixed at the start of the year.

Every meeting will have minutes and action points and these will be circulated as soon as possible after the meeting.

Members to be the Chairs or one representative of each regional music forum.

Additional figures from the music industry and public sector to be invited to attend specific meetings.

3 Other

- Approve an Annual Report to the public.
- Link to the lead organisation.
- The SWMF will be hosted and administered by the Bristol Music Foundation until such a point that it can have complete independent status.