# BIRMINGHAM
# Music Visitor Experience

## OPTIONS AND CONSIDERATIONS REPORT

MARCH 2026

Friendly Fire Band | Birmingham Festival 2023

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# Report Authors

THIS DOCUMENT PROVIDES THE SYNTHESIS OF FINDINGS FROM THREE ROUNDTABLES, THE PUBLIC ONLINE SURVEY AND ASSOCIATED SECTOR ENGAGEMENT ACTIVITY. IT SETS OUT OPTIONS AND CONSIDERATIONS FOR THE DEVELOPMENT OF A BIRMINGHAM MUSIC VISITOR EXPERIENCE. THIS IS NOT A FINAL STRATEGY. IT IS A STRUCTURED ASSESSMENT OF THE EVIDENCE GATHERED TO DATE ALONGSIDE PRACTICAL ILLUSTRATIONS OF HOW THESE FINDINGS MIGHT BE TRANSLATED INTO DELIVERY.

### Birmingham Music Archive (BMA)

**Jez Collins** is the founder of the Birmingham Music Archive, with over 30 years' experience in music heritage, cultural and creative research, stakeholder engagement, project management, partnership development, and the production of high-profile curated projects at local, national, and international levels. He is a peer-reviewed author on music heritage and its relationship to place and space, and regularly contributes to broadcast media as a music historian.

### Live Music Mapping Project (LMMP)

The Birmingham-based team of the LMMP at Aston University consists of **Dr Patrycja Rozbicka** and PhD research assistants Jason Jones, Alice Lintern, Esteban Pérez Ortega, Greg Sharpe, and Owayne Smith. LMMP is a research consortium that maps music ecologies across the UK and beyond, analysing venues, audiences, and cultural infrastructure to support evidence-based policy and industry development. Dr Rozbicka is one of the coordinators of LMMP leading regional and national cultural sector projects, including coordination of live music mapping across 17 cities and wider music sector studies for the West Midlands, and with partners, for the Liverpool City Region and the Northeast Combined Authorities.

**Lara Ratnaraja** is an independent cultural consultant with over 20 years' experience. Her work champions diversity, digital innovation and inclusive leadership across the arts, heritage and creative sectors. With over a decade of experience advising universities, local authorities, heritage institutions, and cultural organisations, she has helped shape strategies that harness culture as a driver for positive social change. Her practice is founded on the principle that culture and creativity can transform lives. Lara specialises in connecting partners across multiple sectors to develop sustainable, collaborative approaches that place inclusion and equity at their heart.

Aston University · Birmingham Museums · Birmingham Music Archive · Live Music Mapping Project

# Foreword

Birmingham music heritage has a vital role in fostering civic pride in the city.

Birmingham Museums Trust's (BMT) mission is to *Bring Birmingham out by shining new light on people's stories, collections and creativity.* The people of Birmingham have told us that showcasing Birmingham's diverse musical heritage is a key way to achieve this (See Recommendation 18, Birmingham Museums' Citizens Jury 2024).

We cannot and should not do this alone, BMT are part of Birmingham's rich cultural ecosystem. We want and need to work with others to make Birmingham a vibrant, interconnected city where cultural richness thrives, citizens are empowered, communities find joy and belonging, trust is nurtured, inequalities are diminished, and sustainability and equity are central to our society (Business Plan 2025-2030).

Summer 2025 saw Birmingham Museums, and Birmingham Museum & Art Gallery (BMAG) in particular, fulfil its role as a key Birmingham civic space, hosting the *Ozzy Osbourne: Working Class Hero* display during the *Summer of Sabbath* (and beyond) and the book of commemoration after his death. This exhibition has changed how the museum is seen and used by both Birmingham residents and visitors to the city.

There is a curatorial imperative to shine a light on other prominent Birmingham bands and figures from across the city's rich and diverse musical heritage.

Key to BMT plans is to fundraise to redevelop BMAG (Business Plan 2025-2030), there is a very strong case for Birmingham musical heritage and identities to form a key theme/narrative in any new development.

This doesn't have to be, and probably shouldn't be, limited to traditional object-based displays. People want to hear the music, to reminisce, to make social and spiritual connections.

Building on learning from hosting *In Pursuit of Repetitive Beats*, there is also an opportunity to explore VR and XR approaches to interpreting Birmingham musical heritage in the newly equipped Gallery 33 of BMAG.

Over the next four years, BMT will focus on understanding what drives engagement and how we can increase and improve attendance, ultimately helping to close the benefit gap across our activities. How can our places, collections and activities be used by more people from working class backgrounds?

It would be really useful to test our assumption that celebrating Birmingham's diverse musical heritage, and in particular artists from working class backgrounds, could help address this gap in attendance.

**Charlotte Holmes**
**Director of Engagement**
**Birmingham Museums Trust**

Ozzy Osbourne Working Class Hero Exhibition | © Birmingham Museums Trust

# Introduction

"*What Would a Birmingham Music Visitor Experience Look Like?*" is a strategic scoping project that explores how Birmingham can grow a place-based, distinctive, inclusive and sustainable music visitor experience that celebrates the breadth and depth of the city's diverse musical heritage and develops its identity as a music city.

The project maps and connects existing assets, identifying gaps and opportunities.

Project activities included:

- **Research and mapping:** An audit of Birmingham's existing and proposed music heritage-related assets: venues, archives, collections, public art, exhibitions, digital & mobile applications and community initiatives—alongside benchmarking against other successful music cities such as Liverpool, Austin and Berlin.
- **Stakeholder engagement:** Workshops, interviews and focus groups with key partners across music, heritage, tourism, local government, and communities (both hyper-local communities but also music genre communities). This will co-design a shared vision and strengthen cross-sector collaboration.
- **Audience and market insight:** Analysis of potential audiences (local residents, regional, national and international visitors) and assessment of the potential economic, social and cultural impact of a Birmingham Music Visitor Experience.
- **Considerations and options development:** Exploration of delivery models such as music trails, exhibitions, digital interpretation, live events, or a dedicated visitor experience/s.

This project aims to help define how Birmingham can tell its music stories to the world, transforming its rich and diverse musical legacy into a coherent, accessible visitor experience that drives inclusive economic growth, civic pride and cultural tourism across the city, laying the groundwork for future investment and partnership projects aligned with Birmingham City Council's priorities around inclusive economic growth, visitor economy development and cultural place-making

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WHAT WOULD A BIRMINGHAM MUSIC VISITOR EXPERIENCE LOOK LIKE?

# Contents



# Executive Summary

Despite being informally acknowledged by fans, artists, scholars, scenes, and international visitors, Birmingham's identity as a music city has historically been underarticulated in strategic visitor-facing formats. Across genres as wide-ranging as heavy metal, reggae, bhangra, punk, folk, classical, jazz, techno, and experimental, Birmingham has played formative roles in the development of globally significant styles. This report captures how respondents currently perceive Birmingham's music offer, what they expect or desire from a future "*Music Visitor Experience*," and how the city's heritage, scenes, venues, and cultural infrastructure could shape such an initiative.

In Pursuit of Repetitive Beats | © Birmingham Museums Trust

The project team has combined insights from three stakeholder roundtables, a large-scale public survey of 1,006 respondents, and a full redevelopment of the Birmingham music assets map to evaluate the potential for a Birmingham Music Visitor Experience. The report does not set out to identify a single delivery model which reflects the feedback and findings from the audience survey. Instead, it frames a set of practical options and considerations grounded in how Birmingham's music ecosystem currently operates, how audiences engage with it, the potential growth for the sector and where constraints currently sit.

Across two datasets derived from the three roundtables and public survey there is strong alignment. Birmingham is widely recognised as a city with globally significant music heritage, shaped by its diverse communities, histories of migration, and a rich mix of genres, alongside a deeply embedded culture of live music, grassroots creativity, and community-led activity. Demand is not speculative. Nearly 90% of survey respondents are already travelling to Birmingham for music, and engagement levels are consistently high.


BMAG 2022 reopening event | © Birmingham Museums Trust

However, the evidence also points to a structural gap between cultural strength and visitor economy performance. Stakeholders describe a city rich in content but fragmented in presentation. Audiences describe a place they value, but one that is difficult to navigate, discover, and experience as a coherent whole.

Three consistent themes emerge.

- First, **Birmingham's distinctiveness lies in its plurality.** Its music identity is not singular or brand-led, but place-based, multicultural, and distributed across neighbourhoods such as Handsworth, Digbeth, Aston, and Kings Heath. This is a strength, but it requires active curation to function as a visitor offer that celebrates that uniqueness without reducing it to a single, uniform experience.

- Second, **there is clear demand for a hybrid experience model.** Audiences want a combination of anchor experiences, neighbourhood exploration, heritage interpretation, and live performance. They do not want a single attraction. They want a connected city that can be easily navigated.

- Third, **delivery constraints are systemic rather than thematic.** Transport, communication, coordination, and infrastructure are repeatedly identified as limiting factors. These shape dwell time, visitor confidence, and secondary spend. Tackling these challenges is therefore essential to enabling a thriving, inclusive, and sustainable music-led visitor offer.



From these themes a series of **Key Considerations** emerged:

- The primary opportunity is to **extend and deepen existing music-led visits,** rather than create new demand.
- Growth will be driven by **increased dwell time, repeat visitation, and secondary spend,** particularly in food, drink, and accommodation.
- The evidence supports a **hybrid delivery approach,** not a single model.
- **A distributed, place-based model** offers immediate, low-cost activation.
- **Selective anchor development** may strengthen long-term impact, where supported by demand.
- **Live music infrastructure is fundamental.** Grassroots and mid-scale venues are central to authenticity and sustainability.
- **Systemic constraints remain a key barrier,** including fragmentation, limited coordination, and gaps in transport, safety, and infrastructure.
- A **phased approach** is required:
  - Early focus on low-cost, high-impact actions (coordination, communication, pilot itineraries)
  - Testing of partnership and packaging models
  - Capital investment only where demand and delivery are proven
- **Governance is critical.** A hybrid model combining civic leadership with cross-sector coordination is likely to be most effective.
- Birmingham's music identity is **plural, place-based, and community-rooted.**
- The core challenge is to **curate, connect, and present this as a coherent visitor experience.**

**The central consideration is therefore not whether Birmingham has enough cultural content. It does. The question is whether that content can be connected, interpreted, and supported in a way that translates into a credible visitor experience that warrants repeat and overnight stays.**

# Methodology

This report draws on a combined qualitative and quantitative research approach, integrating stakeholder insight with audience behaviour data.

The qualitative component is based on three structured roundtables held in February 2026 at Birmingham Museum & Art Gallery. A total of 108 invitations were issued, with 70 organisations registering and 49 attending. Participants represented a cross-section of the music ecosystem, including cultural institutions, heritage organisations, music venues and festivals, tourism, hospitality, policy bodies, and practitioners.

The sessions were organised around three themes:

- tourism, hospitality, and policy
- heritage, archives, and collections
- music sector and practitioners

Each session was facilitated and recorded, with findings derived through thematic analysis of recurring issues, points of consensus, and areas of divergence.

The quantitative component is based on a public survey. The survey went live on 30th December 2025 closing on 28th February 2026 with 1,006 responses collected over the 60-day period. The survey combined structured and open-ended questions, capturing data on motivations, behaviours, spending patterns, and perceptions of Birmingham's music offer. It was shared via many social media platforms spanning music sites like the Birmingham Music Archive Facebook Group (circa 5000 members), the Student Union at Birmingham City University, Birmingham City Council's Be Heard site and Birmingham Museums Trust.

The sample is self-selecting and reflects a highly engaged cultural audience rather than a statistically representative population. However, the scale of response and consistency of findings provide a robust evidence base for identifying patterns in demand, barriers, and opportunity which warrants further interrogation.



Importantly, both datasets have been analysed as integrated inputs into thematic sections of this report, rather than as standalone outputs. This ensures that findings directly inform structural analysis, economic considerations, and delivery options.

Data for the redevelopment of the Birmingham music assets map was collected through systematic desk research, venue and organisation verification, and targeted outreach to local stakeholders. Building on the original 2020 Birmingham Live Music Map, the team cross-checked existing entries, identified missing assets, and updated classifications to ensure accuracy. The map was further expanded using Companies House records to verify operational status and sector categorisation, alongside data from the West Midlands Night-Time Cultural Infrastructure Map (West Midlands Growth Company, 2025).

The goal of this process was to showcase where music visitors can meaningfully experience and enjoy music across the city. Together, these sources produced a refreshed and comprehensive representation of Birmingham's contemporary music ecosystem (Live Music Mapping Project).

TOURISM, HOSPITALITY, AND POLICY

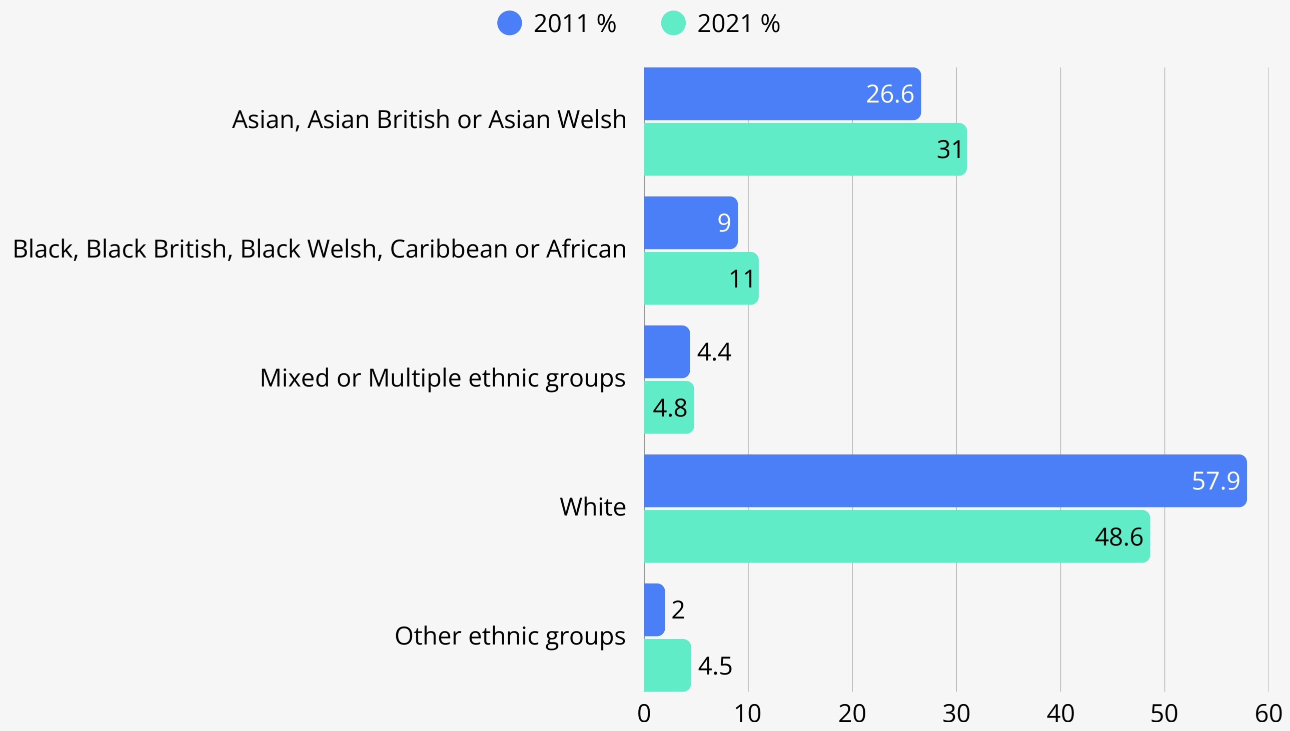
HERITAGE, ARCHIVES, AND COLLECTIONS

MUSIC SECTOR AND PRACTITIONERS

# Birmingham Music Ecosystem: Context, Demand and Growth Potential

In 2024, Birmingham was one of the most popular places to move to in the country. Alongside rapidly increasing housing development and significant growth in employment, this is bringing new audiences and increasing demand for cultural experiences. This is set against a backdrop of shifting demographics (see Figure 1) (ONS Census, 2021), with projections indicating that the city will have no overall ethnic majority within the next twenty years.

**Figure 1. Percentage of usual residents by ethnic group, Birmingham**




Source: Office for National Statistics - 2011 Census and Census 2021




Idles | Birmingham O2 Academy

Oxford Economics forecasts Birmingham's Gross Value Added (GVA) will increase by 16% to £31.8 billion by 2033, ahead of the UK average, reinforcing the city's position as a growing economic centre (Knight Frank Research, 2023).

Birmingham is already an established visitor destination. The wider West Midlands attracted 101.5 million visitors in 2024, a 2.9% increase on the previous year, generating £14 billion in economic value, up 7% (West Midlands Growth Company, 2025). Tourism now supports 114,475 full-time equivalent jobs, underlining its role as a core economic sector. However, visitor patterns remain heavily weighted towards short stays, with 89.8 million day visits. Spending is concentrated in retail (£4.9 billion), followed by food, drink, and recreation, highlighting the opportunity to increase dwell time and secondary spend.

National evidence reinforces the role of music within this landscape (Sound Diplomacy, 2021). Music tourism generated £10 billion for the UK economy in 2024, with 23.5 million visitors, while the West Midlands attracted approximately 1.4 million music tourists, generating £550 million and supporting over 4,500 jobs. This demonstrates a substantial and underdeveloped market aligned with existing visitor flows. (UK Music 2025). Evidence from exhibitions and events further illustrates the scale of demand.

## / ECOSYSTEM

Since opening on the 25th June 2025, *Ozzy Osbourne (1948–2025): Working Class Hero*, has attracted over 510,000 visitors. Over 50,000 visitors visited BMAG to sign the Ozzy Osbourne Book of Condolence and August 2nd was the most visited day for BMAG in over 10 years.

Birmingham Music Archive's *In The Que: Celebrating the Que Club*, a sensory celebration of one of the UK's greatest music venues in 2022 attracted 408,000 visitors as part of the museum's Commonwealth Games pop-up exhibitions. While Capsule's 2011 *Home of Metal* and 2019 *Black Sabbath: 50 Years* exhibitions attracted 15,892 and 23,030 paying visitors respectively.

In nearby Coventry, the independently run and curated Coventry Music Museum welcomed its 40,000th visitor in 2023, demonstrating the wider regional appeal of dedicated music visitor attractions.

In addition to museum-based exhibitions, the West Midlands Growth Company's *Summer of Sabbath*, anchored by the *Back to the Beginning* concert at Villa Park, attracted over 300,000 visitors to the city. The programme, which culminated in Black Sabbath's final performance featuring all four founding members, achieved hotel occupancy rates of 89% and generated an estimated £20 million boost to Birmingham's visitor economy, with approximately £27.6 million in gross output retained within the West Midlands (City-REDI, 2025)

Ozzy Osbourne Working Class Hero Launch | © Birmingham Museums Trust

BMAG reopening B2022 Festival event | © Birmingham Museums Trust

As this report was being finalised, a series of announcements highlighted growing momentum around Birmingham's music offer. These included plans for a permanent Icons Wall at Birmingham Airport, the installation of four city centre murals celebrating album covers from UB40, Duran Duran, Electric Light Orchestra, and Black Sabbath, and confirmation from Birmingham City Council that it is exploring the potential to apply for UNESCO City of Music status or to join the Music Cities Network. This announcement formed part of the city's Budget.

The live music scene is diverse, attracting audiences both locally and nationally as well as internationally to shows like the aforementioned Black Sabbath gig alongside, for example, Diljit Dosanjh who consistently breaks box office records at the Utilita Arena and saw a historic gig in Birmingham 2024 when Ed Sheeran joined him on stage.

Taken together, this evidence points to a consistent position. Birmingham already has the audience, activity, and cultural depth required to support a strong music visitor economy. The opportunity is not to create demand, but to better connect, extend, and translate this activity into a coherent and economically sustainable visitor experience.

# BIRMINGHAM LIVE MUSIC ECOSYSTEM: ANALYTICAL SUMMARY OF PHYSICAL INFRASTRUCTURE

Understanding the distribution, scale and character of B-postcode's live-music spaces is essential for interpreting how music is experienced by visitors across the city. Comprehensive mapping provides a clear picture of where live performance actually happens, revealing a cultural landscape that extends far beyond well-known venues to include grassroots rooms, community hubs, nightclubs, and large-scale arenas. By identifying these spaces, their capacities, and the multiple functions many of them perform, the mapping highlights Birmingham's distinctive polycentric music offer and the diverse pathways through which audiences encounter live music.

Crucially, this evidence-based approach also enables comparisons over time, capturing patterns of growth, closure and hybridisation within the city's venue ecology. Such mapping supports strategic planning, cultural investment and audience development, ensuring that Birmingham's rich live-music infrastructure is visible, valued and embedded within the wider visitor experience.

B-postcode's live music ecosystem is one of the most diverse, spatially distributed, and structurally layered in the UK (LMMP, 2026). The dataset of physical assets across the B-postcodes (308, as of March 2026; Figure 2; LMMP 2026) reveals a remarkably dense concentration of visitor-facing live-music spaces accounting for roughly 63% of all physical music assets. The remaining 37% consists primarily of rehearsal rooms, recording facilities, educational spaces, and retail-based music assets, which support the wider ecosystem but are not core to the visitor live-music experience.

The total capacity (when data is available) of these assets is 188,110, with 89% of all entries in the current dataset carrying multiple functional or activity classifications, confirming that Birmingham's live-music ecosystem is highly hybridised and that most venues operate across more than one category (e.g., Arts Centre + Small Venue + Community Space; Pub + Venue + Events Space).

At the foundation of Birmingham's live-music offer are its grassroots venues, dominated by bars, pubs, and cafés with music, which collectively represent over 40% of all live-music places in the dataset. Bars and pubs with music alone number 96, with a further 17 cafés and restaurants offering programmed or regular live performance. Capacities typically span from 50 to 200, creating intimate social environments where audiences encounter live music as part of everyday cultural life.



Well-established examples include The Actress & Bishop, The Flapper, The Spotted Dog, The Old Crown, The Village Moseley, and Joe Joe Jim's, all hosting regular acoustic sets, folk sessions, DJs, covers acts, indie, and rock nights. These spaces are widely distributed across districts such as Digbeth, Moseley, Kings Heath, Harborne, Stirchley, and Erdington, underscoring the city's polycentric grassroots culture. These venues form the entry-level layer of the visitor experience, shaping first encounters with Birmingham's musical identity.

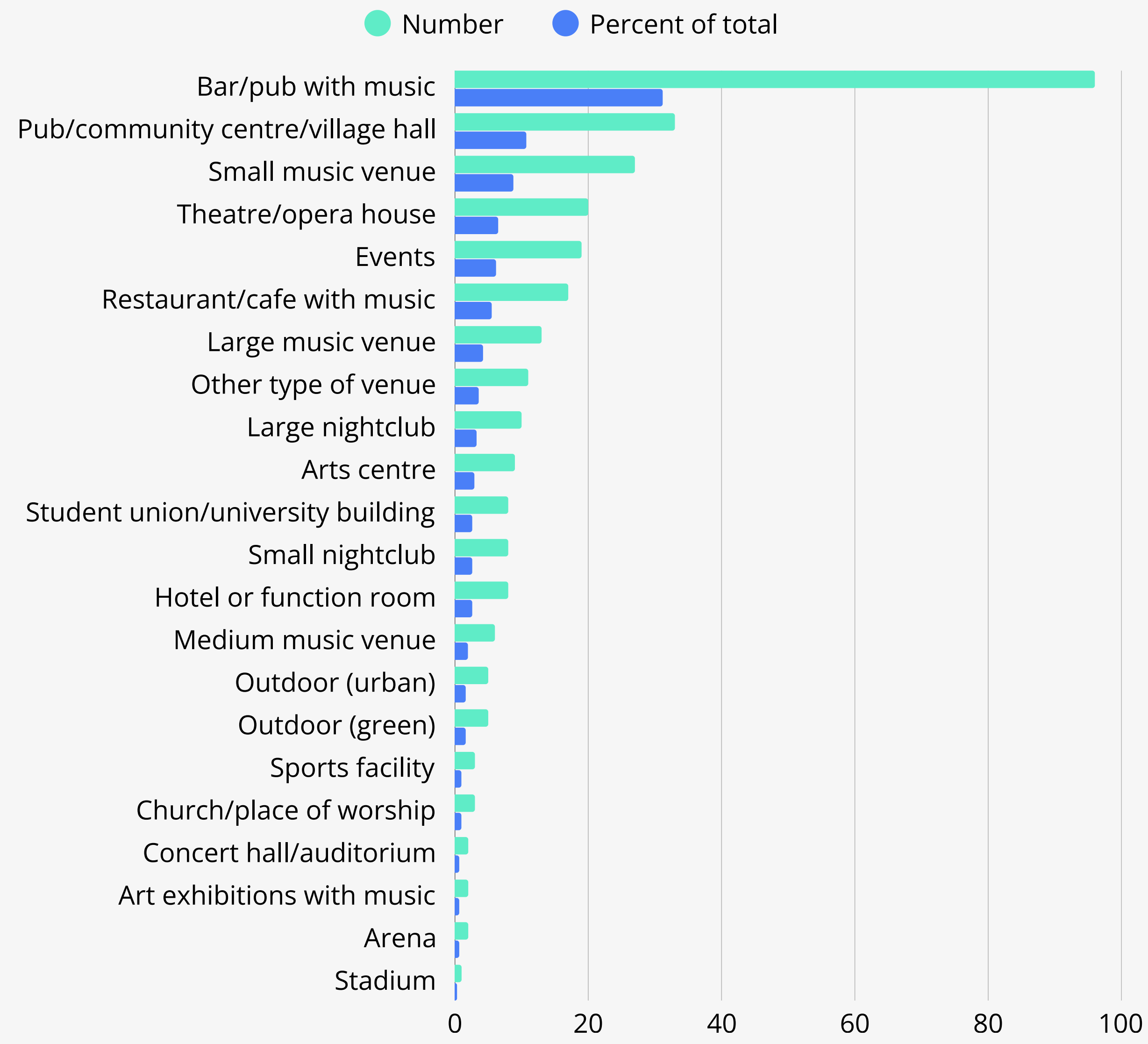
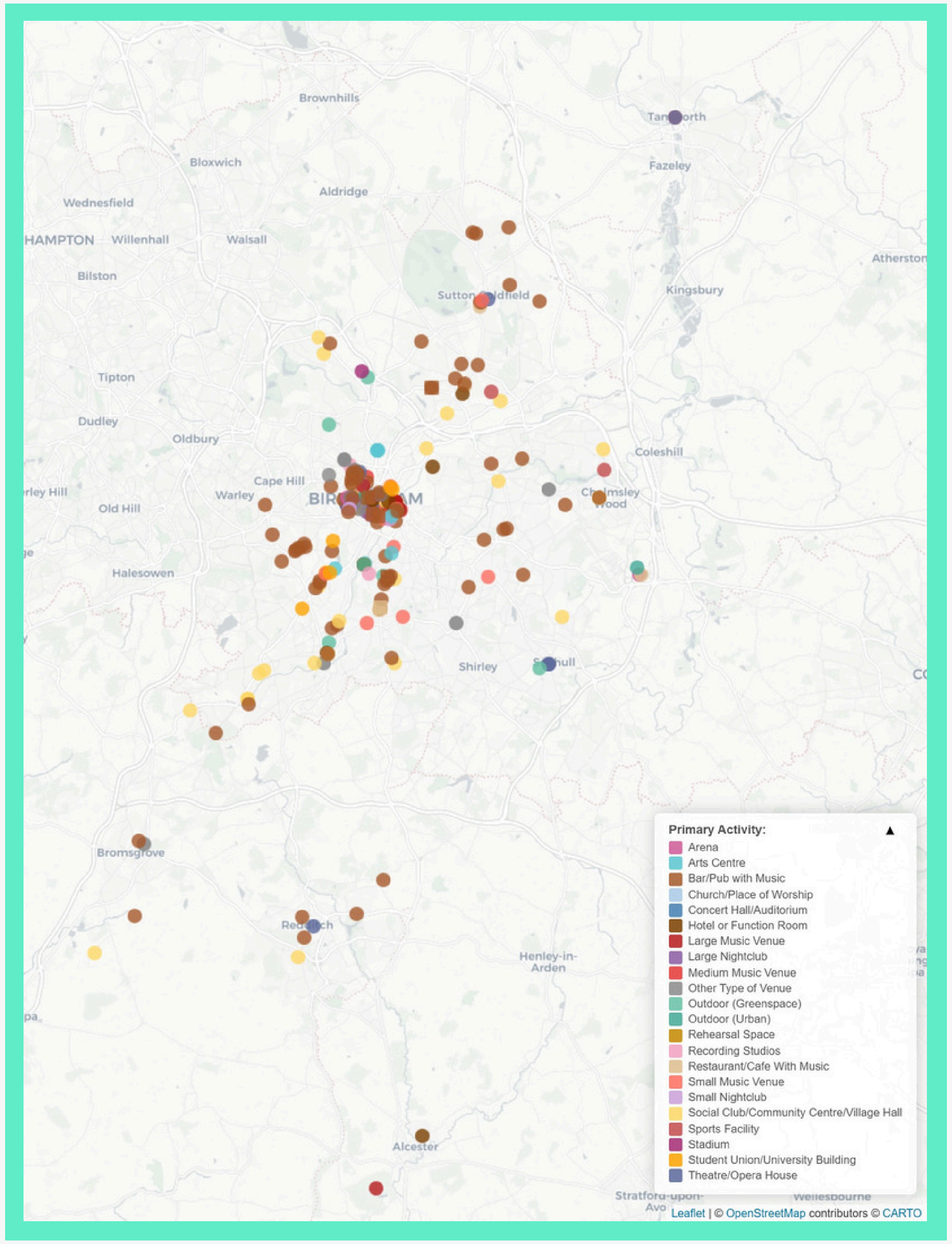



Figure 2. Breakdown of all live music venues across B-postcode, March 2026

Birmingham Live Music Map © Live Music Mapping Project







Divorce | The Castle & Falcon

A further 15–17% of the ecosystem consists of dedicated small and medium-sized venues, providing more professionalised staging, technical capacity, and curated programming. Small venues—including The Sunflower Lounge, Hare & Hounds, Deadwax, Muthers Studio, and The Night Owl—typically hold 100–300 people and support emerging artists, niche genres, and touring acts. Medium venues such as The Crossing, The Asylum, Deadwax, and The Jam House accommodate 300–750, acting as critical stepping-stone stages within the artist pipeline and offering visitors a more structured cultural programme.

At the upper end, Birmingham's large music venues, concert halls, and arenas represent about 5% of live-music spaces but offer the greatest audience reach. With capacities ranging from 1,500 to nearly 18,000, this category includes O2 Academy (Rooms 1–3), O2 Institute, The Mill, Symphony Hall, Town Hall, Utilita Arena, BP Pulse LIVE, and Alexander Stadium for occasional large-scale events. These venues anchor the city's national and international touring circuit.

Complementing these commercial and dedicated venues is a substantial cohort of community-based spaces, representing roughly 20–23% of the live-music ecosystem depending on collapsing various categorisations (e.g. community centres and/or social clubs). This group includes social clubs, community centres, arts centres, libraries, and churches such as Centrala, Thimblemill Library, St Paul's Church, Kings Heath Community Centre, and the Irish Centre, typically offering capacities of 100–350. These venues broaden cultural access, reflect the city's demographic diversity, and sustain local scenes including folk, world music, jazz, community festivals, and choral traditions. But also, these spaces provide insight into the city's cultural diversity and hyper-local music practices.

Finally, nightclubs, representing 6–7% of the ecosystem, remain central to Birmingham's reputation in electronic, dance, and underground cultures. Venues such as Lab11, Suki10c, Mama Roux's, Sector 57, Snobs, Rosies, and Luna Springs host live DJs, MCs, and performance-led club nights with capacities spanning 150 to 1,500. These spaces continue to define Birmingham's identity in EDM, house, bass music, and alternative nightlife scenes. The remaining 8% is divided between unorthodox spaces: arts exhibitions with music, events, outdoor urban and green spaces, diversifying the map even further.

## BIRMINGHAM LIVE MUSIC ASSETS: 2020 VS 2026

A comparison of the 2020 Birmingham Live Music Population Ecology (LMMP 2022; Rozbicka et al 2022) dataset and the updated 2026 dataset (LMMP 2026) reveals both strong continuity and clear structural shifts in the city's live-music landscape. Continuity is most visible in the dominance of grassroots venues: in 2020, pubs, bars and small venues represented 49.36% of all mapped spaces; in 2026 they still form the largest single category, with 96 pubs/bars and 17 restaurant-music venues, maintaining a share of just over 40% of all visitor-facing spaces. This reaffirms Birmingham's longstanding reliance on small-scale, socially embedded performance environments.

Both datasets also show a broad spread of venues across the city, countering myths that activity is centred exclusively in the city centre and south. In 2020, LMMP observed significant but under-networked activity in northern districts such as Sutton Coldfield and Erdington; the 2026 dataset shows this pattern continuing, with many north city venues categorised as pubs or social clubs.

However, significant differences emerge in scale, categorisation, and volume. The 2020 map identified 195 venues, with an estimated total audience capacity of 98,000 across the B-postcode. By contrast, the 2026 dataset records 308 live music-related assets. This reflects not only dataset expansion but also the broader inclusion of outdoor venues, arts centres, multi-room complexes, and newly opened spaces. There is also noticeable growth in mid-sized and multi-space venues, including expanded nightclub provision and more flexible arts-centre rooms—categories that were proportionally smaller in 2020 (~3% for medium/large venues), but are more prominent in the 2026 dataset.

Overall, the 2026 figures suggest a more complex, denser and more hybridized venue ecology, while structurally reaffirming the grassroots-driven character already visible in the 2020 study.

The evidence presented in this section shows that Birmingham's music ecosystem is operating within a city undergoing profound demographic, economic and cultural transformation. Rapid population growth, major infrastructure investment, and the absence of a single dominant heritage brand place Birmingham in a distinct position compared with other UK destinations. The city is already a high-performing visitor economy, attracting record numbers of domestic and international visitors, with strong day-visitor demand and rising spend across retail, food, drink and recreation. This demand is echoed in the sustained popularity of music-related exhibitions and large-scale events, from museum-based shows to city-wide programmes such as Summer of Sabbath.




Nortons Digbeth

**THE LIVE MUSIC SECTOR EMERGES AS BOTH AN ANCHOR AND AN OPPORTUNITY**

Against this backdrop, the live music sector emerges as both an anchor and an opportunity. Family visitor behaviour is shifting toward value-focused, experience-driven cultural consumption, (Baker Richards, 2025) while creative sector research evidences strong participation in live music relative to other art forms (DCMS, 2025)—yet also reveals that much music activity in diasporic and non-traditional venues is underrepresented.

This positions Birmingham well: its music culture is deeply embedded across everyday, informal, and community-based settings, making it accessible to a wide range of residents and visitors. The city's globally recognised artists—across heavy metal, reggae, British Asian music, jazz, gospel and experimental scenes—sit alongside grassroots practices that reflect the city's working-class heritage and long histories of migration.

The updated 2026 live music dataset confirms that Birmingham's ecosystem has expanded significantly in both scale and complexity since 2020, revealing a denser, more hybridised and spatially diverse landscape of over 300 mapped assets operating across a highly polycentric geography. Grassroots pubs, bars and small venues remain the system's foundation, while mid-sized stages, multi-room complexes, community hubs and nightclubs together form an increasingly layered and flexible cultural infrastructure.

This hybridity reflects the city's wider cultural identity—multifaceted, multi-centred and resistant to singular narratives—and underpins a vibrant, expansive and authentically grassroots-driven ecosystem with enormous potential for a unified Birmingham Music Visitor Experience. Realising this potential, however, depends on curating a cohesive narrative that connects Birmingham's many music histories, communities and spaces into a navigable and compelling offer for visitors; if harnessed effectively, the city's plurality becomes not a challenge to overcome, but its defining competitive advantage.

# Roundtable Findings

While the ecosystem data reveals a dynamic and polycentric music landscape, numbers alone cannot capture how this complexity is felt, navigated, and sustained by the people who build and run it.

The stakeholder roundtables therefore provide essential qualitative depth, highlighting sector-wide perspectives on challenges, opportunities, and the conditions required to deliver a compelling Birmingham Music Visitor Experience.

The **key themes** emerging from these discussions are set out below.

- **FRAGMENTATION, VISIBILITY, AND THE 'HIDDEN GEMS' PROBLEM**
- **THE NEED FOR A COHERENT VISITOR OFFER AND NARRATIVE**
- **PLACE, NEIGHBOURHOODS, AND DISTRIBUTED CULTURAL ASSETS**
- **GRASSROOTS CULTURE, COLLECTIONS, AND UNDER-RESOURCED INFRASTRUCTURE**
- **COMMUNICATION, COORDINATION, AND CULTURAL INFRASTRUCTURE**
- **BARRIERS TO GROWTH: TRANSPORT, SAFETY, AND ACCESSIBILITY**



## FRAGMENTATION, VISIBILITY, AND THE 'HIDDEN GEMS' PROBLEM

A dominant theme across all roundtables is the idea that Birmingham's music culture is not lacking in content, but in visibility, coordination, and accessibility. Stakeholders repeatedly describe the city as having "so many gems" but no clear way for audiences to discover or navigate them.

> "SO MANY GEMS" BUT NO CLEAR WAY FOR AUDIENCES TO DISCOVER OR NAVIGATE THEM.

Participants highlight that music activity, heritage assets, and cultural experiences are distributed across neighbourhoods, organisations, and informal networks, but are rarely connected into a coherent visitor-facing narrative. This fragmentation is experienced both by visitors and by those working within the sector itself, many of whom report difficulty keeping track of what is happening across the city.

The absence of a centralised "what's on" platform or coordinated communications infrastructure is identified as a key barrier. Stakeholders note that discovery often relies on informal networks, word of mouth, or fragmented digital channels, resulting in missed opportunities for attendance and engagement. As one participant notes, "there isn't even a central point where people can find out what's going on in Birmingham."

This lack of visibility is seen as directly limiting Birmingham's ability to function as a music tourism destination, despite the scale and diversity of its cultural offer.

This is a sector passionate about their own music archival heritage which can lead to a partisan approach and understandable apprehension as to what a unified marketable offer could look like. However, this perspective does not fully reflect the significant audience demand and wider potential when considering how multigenerational audiences engage with and consume music culture.

**Key findings:**

- **Cultural assets are widely distributed but poorly connected**
- **Discovery relies on informal and inconsistent channels**
- **There is no centralised platform for audiences or visitors**
- **Fragmentation limits visibility, engagement, and growth**

## THE NEED FOR A COHERENT VISITOR OFFER AND NARRATIVE

Across all sessions, stakeholders emphasise the absence of a clearly defined and communicated music visitor experience "offer." While other UK cities are perceived to have strong, recognisable propositions (e.g. Liverpool's Beatles heritage), Birmingham is seen as lacking an equivalent narrative that can be easily understood and promoted.

Participants argue that the challenge is not a lack of content, but a lack of curation and storytelling. The city's music heritage spans multiple genres, communities, and time periods, but these are not currently presented as a connected experience.

There is strong support for developing a hybrid model that combines:

- **Anchor experiences** (e.g. exhibitions, festivals) such as the proposed Birmingham Music Experience due to open in Digbeth in 2027 by the Birmingham Music Archive.
- **Neighbourhood-based exploration** (blue plaques, walks, food, nightlife)
- **Thematic trails** (genre, community,
- or era-led). As this report was being written the Birmingham Music Archive and Birmingham Open Media announced the launch of Brum SoundTracks, a free to use location-based augmented reality app that brings Birmingham's iconic musical heritage to life through self-guided tours.

WE DON'T TELL A SINGLE, COHERENT STORY ABOUT BIRMINGHAM'S MUSIC.

Importantly, stakeholders stress that this narrative must reflect Birmingham's plural identity, rather than reducing it to a single genre or artist. The city's distinctiveness lies in the interaction between its different music ecosystems, rather than any one dominant story.

**Key findings:**

- **No shared narrative connecting Birmingham's music assets**
- **Visitor experience is fragmented rather than curated**
- **Strong cultural content lacks clear external positioning**
- **Opportunity to develop a distinct and compelling identity**



## PLACE, NEIGHBOURHOODS, AND DISTRIBUTED CULTURAL ASSETS

Consistent with the survey findings, stakeholders describe Birmingham as a network of place-based music ecosystems, rather than a single centralised cultural district.

Areas such as Handsworth, Digbeth, Aston, and other neighbourhoods are identified as critical to understanding the city's music identity, with each contributing distinct histories, communities, and genres. These place-based narratives are seen as essential to creating an authentic visitor experience.

However, participants note that the current visitor infrastructure does not adequately support movement between these areas. Issues of transport, wayfinding, and connectivity are repeatedly raised as barriers to creating a coherent, city-wide experience.

**Stakeholders highlight the need for:**

- **Improved transport connectivity (especially evening travel)**
- **Clear wayfinding and navigation tools**
- **Integrated itineraries linking neighbourhoods**
- **A place-based narrative linking place to story to heritage**

Without these elements, Birmingham's distributed cultural assets remain difficult to access as a coherent experience.

THE MUSIC IS EVERYWHERE, BUT IT'S NOT ALWAYS OBVIOUS WHERE TO GO.

**Key findings:**

- **Music assets are geographically distributed across neighbourhoods**
- **Lack of clear spatial narrative or wayfinding**
- **Visitors struggle to navigate beyond the city centre**
- **Opportunity to develop place-based cultural journeys**

## GRASSROOTS CULTURE, COLLECTIONS, AND UNDER-RESOURCED INFRASTRUCTURE

Another key theme is the importance of grassroots organisations, independent venues, and informal archives in sustaining Birmingham's music culture.

Participants emphasise that much of the city's heritage is held not in major institutions, but in:

- **Private collections**
- **Community archives**
- **Independent labels and promoters**
- **Individual practitioners**

While these represent a significant cultural asset, they are often under-resourced, poorly documented, and at risk of being lost.

Stakeholders express concern that Birmingham lacks the infrastructure to preserve, interpret, and showcase these materials effectively.

At the same time, there is recognition that grassroots spaces are essential to the city's identity.

### A LOT OF THIS RELIES ON PASSION, NOT RESOURCE.

Any visitor experience must therefore balance heritage preservation with live, contemporary culture, ensuring that the city remains a place of active music-making rather than static display.

It was clear from feedback that consumers valued authentic music, programmed in grass roots music venues alongside the exhibiting of music culture in traditional spaces such as museums.

**Key findings:**

- **Grassroots sector is essential but under-resourced**
- **Cultural collections are fragmented and vulnerable**
- **Reliance on informal labour and passion**
- **Risk to long-term sustainability and visibility**



## COMMUNICATION, COORDINATION, AND CULTURAL INFRASTRUCTURE

Across all three roundtables, stakeholders identify coordination and communication as critical systemic challenges.

There is a widespread perception that:

- **Organisations operate in silos**
- **Collaboration is informal rather than structured**
- **There is no central body or mechanism to coordinate activity**
- **There is a balance of the rawness of authenticity alongside the polish of formal presentation**

This lack of coordination extends to the visitor experience itself, where connections between music, food, hospitality, and other cultural sectors are not consistently made visible or accessible.

It is also reflected in a narrative that lacks authenticity and underrepresents the contribution of industrial working-class music cultures across different communities and periods.

In particular, the absence of connections between the emergence of genres in the late 1950s and 1960s and the influences of working-class life and migration represents a missed opportunity to position Birmingham's music story within a broader, globally relevant context.

### EVERYONE IS DOING GOOD WORK, BUT NOT ALWAYS TOGETHER.

Participants also highlight the absence of shared tools and platforms, such as:

- **Centralised event listings**
- **Booking and itinerary planning systems**
- **Shared marketing infrastructure**
- **Audience insight and consumer behaviour that reflects the diversity of the city's communities**

These gaps are seen as limiting both audience engagement and economic impact.

**Key findings:**

- **Limited coordination across the sector**
- **Communication is fragmented and informal**
- **No central infrastructure for alignment or collaboration**
- **Missed opportunities for collective impact**

## BARRIERS TO GROWTH: TRANSPORT, SAFETY, AND ACCESSIBILITY

In line with the survey findings, stakeholders identify a set of practical barriers that limit Birmingham's potential as a music tourism destination.

These include:

- **Late-night transport limitations**
- **Perceived safety issues, particularly around transport hubs**
- **Lack of clear, accessible information**
- **High costs and limited support for small organisations**

Transport is a particularly prominent issue, with participants noting that while Birmingham appears geographically compact, movement between neighbourhoods can be difficult, especially in the evening.

Stakeholders frequently compared Birmingham's transport offer with cities such as Liverpool and Manchester, where dedicated late-night bus services have been reinstated or expanded specifically to support the night-time economy.

For example, Liverpool's N1 night bus operates every weekend, running between the city centre and Birkenhead until approximately 5am and offering a £2 capped fare, reinstated by the Liverpool City Region in 2023 to support night workers and visitors.

Similarly, Greater Manchester introduced new 24/7 Bee Network night buses (routes V1 and 36), offering hourly late-night connections across Manchester, Salford, Leigh and Bolton to strengthen safety, affordability, and accessibility for night-time workers and visitors.

> GETTING AROUND, FEELING SAFE, AND KNOWING WHERE TO GO ALL MATTER.

These examples illustrate that late-night mobility is not simply a transport matter but a strategic lever for growing the night-time and music economies. In Birmingham, the absence of comparable provision is understood not as an isolated issue but as part of a network of interconnected barriers that affect visitor confidence, dwell time and overall experience.

### Key findings:

- **Transport limitations affect mobility and access**
- **Safety perceptions shape audience behaviour**
- **Accessibility remains an ongoing challenge**
- **Visitor experience extends beyond cultural provision**

In Pursuit of Repetitive Beats | © Birmingham Museums Trust

# Public Survey Findings

## INTRODUCTION & CONTEXT

The roundtable findings highlight systemic issues; fragmentation, weak coordination, uneven transport, and the under-recognition of grassroots and diasporic cultures that shape Birmingham's music ecosystem. To determine how these conditions translate into audience behaviour and expectations, this section presents a descriptive, narrative-led account of the themes that emerge from respondents' perspectives. These results broadly confirm the patterns identified through the roundtables, providing a robust evidence base to support future strategic decision-making, partnership.


Crowds queueing | Black Sabbath Bench & Bridge

## AUDIENCE PROFILE & SEGMENTATION

The survey dataset shows a respondent pool dominated by Birmingham residents (58.7%), alongside a substantial share of visitors from elsewhere in the West Midlands (26.4%), and smaller but meaningful representation from national visitors (6.56%) and international visitors (1.19%), with remaining group of respondents self-categorising as music industry professionals (3.18%), students (2.78%), and other (0.9%), without providing specific location. This distribution therefore shows a representation whereby Birmingham's music ecosystem is experienced most frequently by those who live in or near the city, reinforcing the significance of resident perception in shaping visitor-facing stories. Gender distribution was broadly balanced: 49.7% women, 46.9% men, and roughly 3.4% identifying as non-binary or preferring not to disclose their gender.

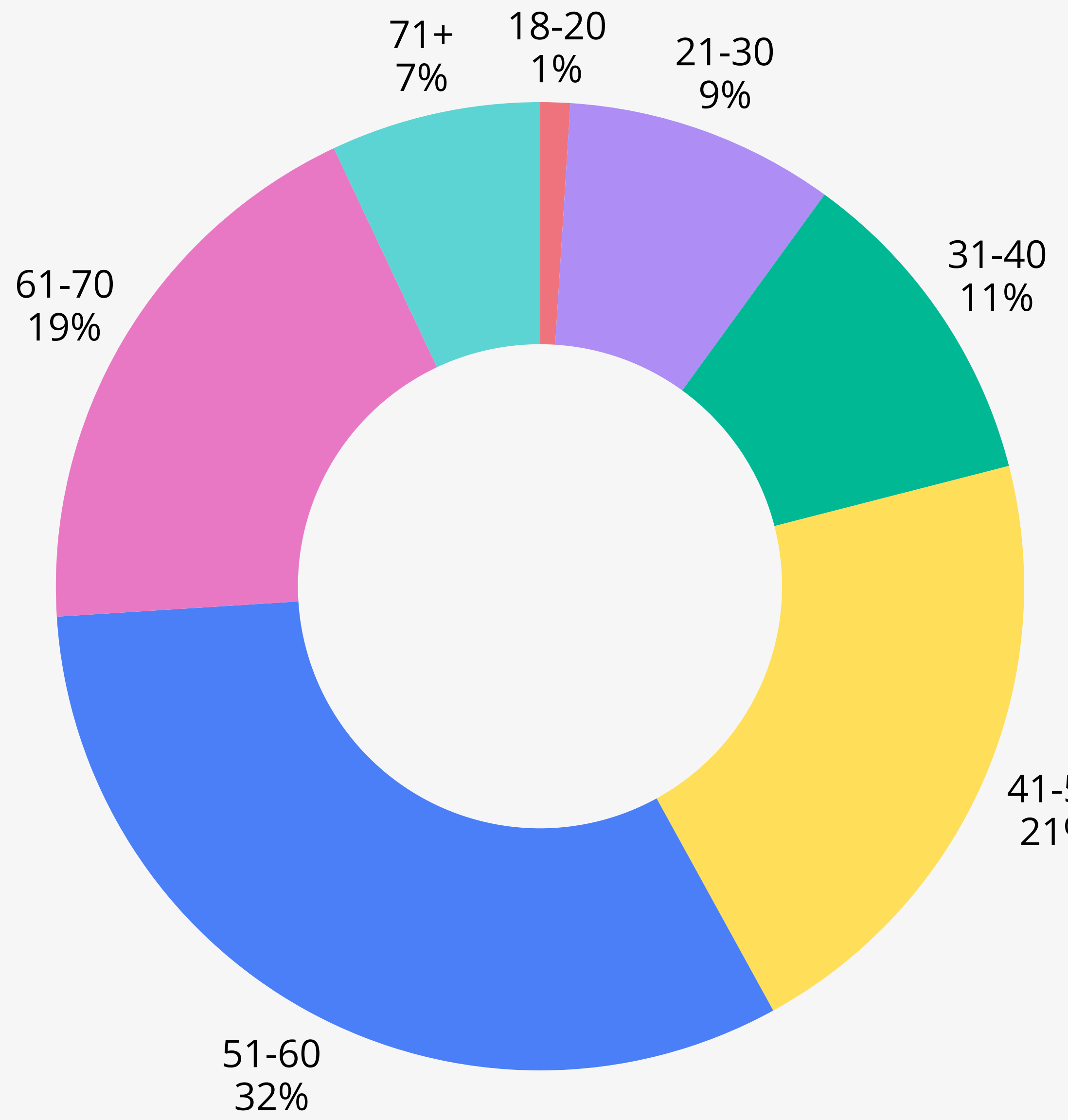
> GENDER DISTRIBUTION WAS BROADLY BALANCED: 49.7% WOMEN, 46.9% MEN, AND ROUGHLY 3.4% IDENTIFYING AS NON-BINARY OR PREFERRING NOT TO DISCLOSE THEIR GENDER.

The age distribution of respondents demonstrates engagement across a broad spectrum of life stages, with a clear concentration in mid-life and older adult groups (Figure 3). The largest cohort is respondents aged 51-60, who make up 31.8% of the sample. This is followed by the 41-50 age group at 20.8%, and the 61-70 group at 19.3%. Together, these three cohorts account for over 70% of all respondents, indicating that the survey primarily reflects the views of adults in mid-career to later-life stages. Younger adults are represented to a lesser extent: those aged 31-40 constitute 11.4%, respondents aged 21-30 account for 9.1%, and the 18-20 group represents less than 1% of the sample. Respondents aged 71 and over comprise 6.8%, providing meaningful insight from older lifelong participants in Birmingham's music culture.

Overall, this distribution shows that engagement with the survey was strongest among older, culturally active adults. This aligns with wider patterns in music tourism and cultural participation, where participation often increases with age, disposable income, and long-term attachment to music scenes, except 85+ when there is a significant engagement drop (DCMS, 2025). At the same time, the comparatively lower participation from younger age groups suggests that future outreach strategies may be needed to capture a more generationally balanced picture of music engagement in Birmingham.



**Figure 3. Age groups of respondents**




Music engagement across the sample is extremely high. 62.6% engage in music activities "very regularly," while 32.7% do so "occasionally." Fewer than 1% report "never" engaging in music activities. This confirms that respondents are not only culturally engaged but constitute an audience predisposed toward music-led tourism, live performance, and heritage exploration. Nearly 90% of respondents have previously visited Birmingham primarily for a music event or activity. This represents both an existing market base and a strong starting point for a more structured music visitor experience.

# MUSICAL DIVERSITY, MULTICULTURAL IDENTITY AND BIRMINGHAM'S DISTINCTIVE PLACE-BASED MUSIC ECOSYSTEM

## Musical diversity

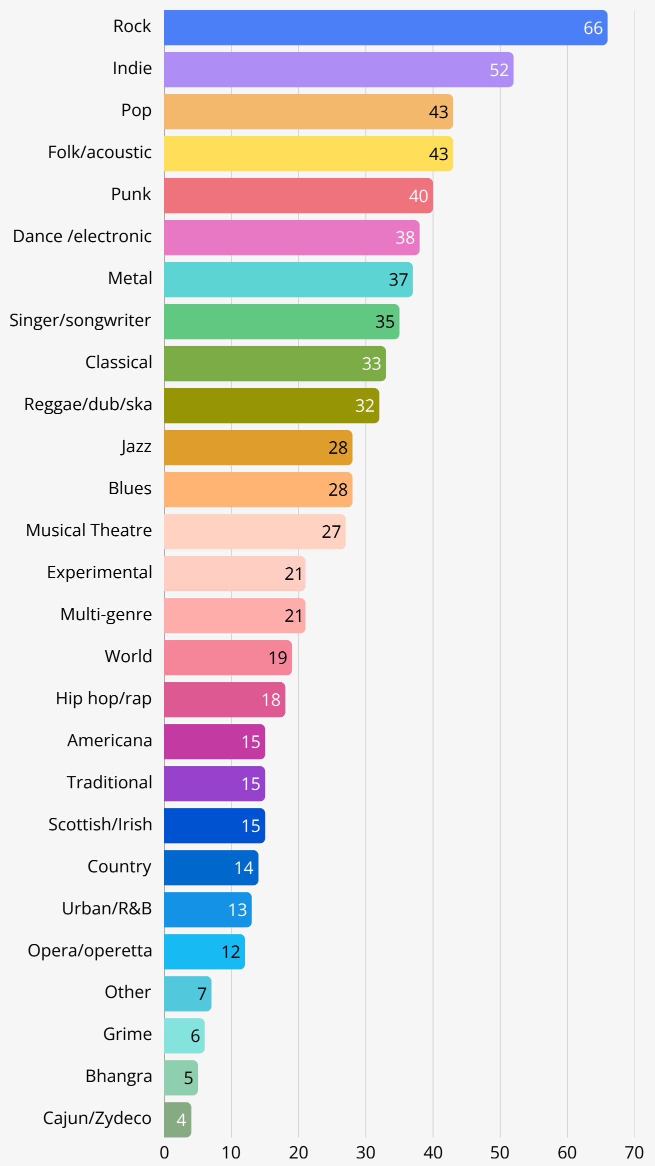



**Figure 4. Percentage of respondents indicating interest in particular genre**

Respondents were asked to indicate their music preferences from an extensive list of genres, including Americana, bhangra, blues, classical, country, dance/electronic, experimental, folk, grime, hip hop, indie, jazz, metal, punk, reggae/dub/ska, rock, singer-songwriter, world music, and more. Their responses revealed a particularly strong interest in rock (66%), followed by indie (52%), pop (43%), folk/acoustic (43%), and punk (40%), with substantial additional audiences for dance/electronic (38%) and metal (37%; Figure 4).

While many respondents selected multiple genres, indicating eclectic musical tastes, a smaller proportion expressed highly focused preferences: 35 individuals identified interest in only a single genre, and 32 identified interest in just two.

These concentrated patterns represent only a small fraction of the overall sample, underscoring that the vast majority of respondents possess diverse and wide-ranging musical interests, aligning with Birmingham's rich and multi-genre cultural identity.

The data paints a picture of Birmingham as a place where genre diversity is not peripheral but central to the city's musical identity.



THE DATA PAINTS A PICTURE OF BIRMINGHAM AS A PLACE WHERE GENRE DIVERSITY IS NOT PERIPHERAL BUT CENTRAL TO THE CITY'S MUSICAL IDENTITY.

This identity is shaped both by the city's historic contributions across multiple genres, ranging from heavy metal and reggae to bhangra, folk, and classical music, and by the equally varied preferences of today's audiences, who engage with this breadth rather than identifying with a single dominant style.

However, it also highlights a disconnect: diasporic music consumers may not see themselves reflected in prevailing heritage narratives. This warrants further interrogation, particularly given that attendance at concerts by ethnically diverse artists is significantly higher than this narrative suggests.

Leaving aside for the moment the Birmingham residents, visitors to Birmingham from within the West Midlands, who make up 26.5% of the total sample, show a preference for guitar-driven and mainstream alternative genres, with rock (10.1%), indie (8.2%), and pop (6.9%) at the forefront, followed by folk/acoustic (6.6%) and punk (6.3%)—a profile rooted in familiar local and UK-wide musical traditions.

Among UK visitors from outside the West Midlands—a relatively small group comprising 6.56% of respondents—this guitar-led tendency is even more pronounced: rock (10.2%) again leads, but is followed by a distinctly more alternative mix of indie (7.7%) and punk (7.0%), alongside substantial engagement with reggae/dub/ska, metal, and dance/electronic (each at 6.3%), suggesting a festival-style blend of mainstream and subcultural tastes.

In contrast, international visitors—1.19% of the total sample—exhibit a more eclectic but culturally specific pattern: while rock (12.6%) remains dominant, this group shows markedly higher interest in metal (8.0%) and in Birmingham's diasporic heritage genres such as reggae/dub/ska (8.0%), as well as a balanced appreciation of folk/acoustic, indie, and pop (each around 6.9%).

These differences highlight that Birmingham's appeal to domestic audiences is strongly anchored in its rock and alternative lineage, while international visitors not only show interest in the city's heavy-music but also its multicultural heritage. As rock is at the top for both inside and outside visitors lists, the argument that an experience for locals and visitors could be mutually beneficial is enhanced.

# MUSICAL DIVERSITY, MULTICULTURAL IDENTITY AND BIRMINGHAM'S DISTINCTIVE PLACE-BASED MUSIC ECOSYSTEM

## Multiculturalism as a core identity marker

Across open-ended comments, respondents repeatedly describe multiculturalism as fundamental to Birmingham's music identity. For many, the city's sound is inseparable from the histories and cultural practices of communities who settled here across successive waves of migration.

Respondents highlight Birmingham's capacity to blend Afro-Caribbean, South Asian, Irish, and Eastern European cultural traditions with local working-class creativity, producing distinctive forms such as reggae, dub, bhangra, Asian underground, ska, and cross-genre fusion styles.

Handsworth in particular is referenced as a symbolic and practical centre of diasporic creativity praised for its reggae heritage, its bhangra innovators, and the cultural vibrancy associated with Caribbean sound systems and South Asian music collectives. This recurring emphasis affirms that Birmingham's cultural plurality is not simply demographic, it is expressed directly in the city's music.

> DIVERSITY—A THOUSAND FLOWERS BLOOMING AMONG BIRMINGHAM'S RICH NEIGHBOURHOODS AND CULTURES.

Respondent ID 100; Q: "If Birmingham became internationally known for its music visitor experience, what would you most like it to be known for?"

> BIRMINGHAM CAN FEEL DISTINCTIVE IF YOU LEAN INTO THE SPECIFIC MUSICAL 'ECOSYSTEMS' THAT GREW OUT OF ITS INDUSTRY, MIGRATION, AND NEIGHBOURHOOD CULTURES, RATHER THAN DOING A GENERIC UK CITY NIGHT OUT.

Respondent ID 989; Q: "What would make a music experience distinctive...?"



> WE COULD ALSO MAKE MORE CHARITABLE THINGS AVAILABLE… UPHOLDING BIRMINGHAM'S REPUTATION AS WORKING CLASS, BUT KIND AND GIVING PEOPLE. MULTI-CULTURAL EVENTS TOO… FOR EXAMPLE, HAVING REGGAE MUSICIANS, FOLLOWED BY A BRIT, AND THEN BHANGRA… LETTING LOCAL, SMALL BUSINESSES HAVE STANDS… WHAT WE DO MOST BEAUTIFULLY AS A CITY IS COMING TOGETHER.

Respondent ID 381; Q: "What would make a music experience distinctive...?"

The History of Grime | The Old Library

> HERE IS WHAT MAKES A MUSIC EXPERIENCE IN BIRMINGHAM FEEL UNIQUE… A UNIQUE 'HEAVY' LINEAGE (METAL & BHANGRA)… BIRMINGHAM IS THE ONLY CITY THAT CAN CLAIM TO BE THE BIRTHPLACE OF TWO DISTINCT 'HEAVY' GENRES… BHANGRA & FUSION… BIRMINGHAM'S MUSIC CULTURE IS DEFINED BY THE PROXIMITY OF ITS COMMUNITIES. THE 'BRUM BEATS' OF THE 80S AND 90S SAW BHANGRA MERGE WITH REGGAE AND DANCEHALL… IN AREAS LIKE HANDSWORTH.

Respondent ID 619; Q: "What would make a music experience distinctive...?"


Steel Pulse mural | Handsworth Park

# MUSICAL DIVERSITY, MULTICULTURAL IDENTITY AND BIRMINGHAM'S DISTINCTIVE PLACE-BASED MUSIC ECOSYSTEM

## Neighbourhoods as cultural anchors

RESPONDENTS IDENTIFY BIRMINGHAM NOT AS ONE MONOLITHIC "MUSIC CITY" BUT AS A NETWORK OF CULTURALLY DISTINCT ZONES, EACH CONTRIBUTING DIFFERENTLY TO ITS MUSICAL STORY.

Respondents identify Birmingham not as one monolithic "music city" but as a network of culturally distinct zones, each contributing differently to its musical story.

Due to their historic venues, grassroots scenes, and key genre-shaping communities, areas such as Digbeth, Handsworth, Aston, Kings Heath, Moseley, Balsall Heath, the Jewellery Quarter, and Erdington are repeatedly mentioned as meaningful locations.

These neighbourhood references highlight how Birmingham's music culture is experienced spatially: listeners understand its heritage through streets, venues, pubs, youth centres, converted warehouses, and DIY spaces that collectively form a distributed cultural map.

They are also reflective of the global migration that occurred in Birmingham from the 1950s onwards and the influence that had on musical genres and influence. The music of Birmingham is interdependent in its music styles, not separate.

Survey participants frequently call attention to both the city's celebrated landmarks (e.g., Station Street, The Crown, the Custard Factory, the Hare & Hounds, Mothers in Erdington) and its "lost venues"—important sites that no longer exist but retain cultural significance. These memories, often tied to neighbourhood identity, reinforce how Birmingham's music heritage depends on place attachment and local storytelling.



Simon Duggal & Mendi Singh | Hare & Hounds


Friendly Fire Band | The Bear Tavern

# MUSICAL DIVERSITY, MULTICULTURAL IDENTITY AND BIRMINGHAM'S DISTINCTIVE PLACE-BASED MUSIC ECOSYSTEM

## Genre heritage and Birmingham's global significance

The association between Birmingham and heavy metal remains exceptionally strong. Many describe the city as "the home of metal," referencing artists such as Black Sabbath, Judas Priest, Napalm Death, and related subcultures. This identity has strong global pull, as visitors from abroad frequently cite Birmingham's metal heritage as their primary association with the city (see: Music Diversity).

Yet, the multicultural claim is not abstract: respondents consistently articulate an expectation that any Birmingham music-visitor experience must reflect the city's cultural plurality in a meaningful way, rather than flattening its history into a single narrative.


Home of Metal Private View | Jas Sansi © Birmingham Museums Trust



Across open-ended responses, audiences emphasise that Birmingham's music identity arises precisely from the interaction of its migrant communities, working-class histories, and neighbourhood-based scenes. They explicitly resist the idea of a visitor offer built solely around a narrow set of artists (such as only Black Sabbath or only the city-centre venues) and argue instead for an experience that showcases the breadth of genres and cultural traditions shaped in places like Handsworth, Digbeth, Balsall Heath, Moseley, and Kings Heath.

Comments highlight that the city's story should be presented as a dynamic mix of reggae, bhangra, Irish folk, metal, punk, jazz, electronic music, and grassroots fusion scenes, rather than a nostalgic or genre-limited package. In this sense, audiences are not merely acknowledging Birmingham's diversity—they are demanding that it be represented authentically, with diaspora-driven genres, neighbourhood heritage, and cross-cultural hybrids placed at the heart of the experience rather than treated as peripheral.

> SHOWCASING THE TOTALITY OF ITS MUSICAL LEGACY (NOT JUST THE USUAL SUSPECTS) AND ITS DIVERSE CONTEMPORARY MUSIC SCENE AT GRASSROOTS LEVEL.

Respondent ID: 10; Q: What would make a music experience in Birmingham feel distinctive compared with other UK cities

> THERE IS SO MUCH MORE TO BIRMINGHAM MUSIC THAN ELO, BLACK SABBATH, UB40 AND DURAN DURAN.

Respondent ID:28; Q: What do you think is currently missing from Birmingham's music

> THE VARIETY OF GENRES COVERED. BE IT IRISH/SCOTTISH FOLK, 2-TONE, REGGAE, BLUES, R&B, GRIME, DRILL AND OF COURSE METAL… THE IMPACT OF BIRMINGHAM IS NOT GENRE LIMITED.

Respondent ID: 38; Q: What would make a music experience in Birmingham feel distinctive compared with other UK cities?

# MUSICAL DIVERSITY, MULTICULTURAL IDENTITY AND BIRMINGHAM'S DISTINCTIVE PLACE-BASED MUSIC ECOSYSTEM

## Grassroots authenticity and community creativity

A dominant theme across hundreds of qualitative responses is authenticity. Participants express a strong preference for a music visitor experience that feels locally grounded, celebrates community life, and reflects the city's grassroots energy rather than a generic or overly curated cultural offering.

> AUTHENTICITY MATTERS: BIRMINGHAM'S MUSIC IDENTITY IS ROOTED IN GRASSROOTS SPACES, NOT CURATED EXPERIENCES.

They emphasise the importance of preserving and showcasing small independent venues, pubs, clubs, and community-run spaces, arguing that these environments are where Birmingham's characteristic "DIY" ethos thrives. Respondents associate the city's most distinctive music with informal rehearsal rooms, open-mic spaces, multi-genre club nights, youth projects, community festivals, and improvised performance settings because these venues allow scenes to develop organically.

This commitment to grassroots authenticity also reflects concerns: respondents worry about venue closures, loss of mid-sized spaces, and the disappearance of cultural infrastructure that has historically nurtured new talent. Yet, despite these challenges, there is a palpable pride in the city's ability to generate innovative music "from the ground up." This grassroots identity is seen as not only historically important but essential to Birmingham's cultural future.


MeMe Detroit | Bear Grooves


MeMe Detroit Merch

# MUSICAL DIVERSITY, MULTICULTURAL IDENTITY AND BIRMINGHAM'S DISTINCTIVE PLACE-BASED MUSIC ECOSYSTEM

## Synthesis: Diversity, place and cultural authenticity as the foundation for a visitor experience

Taken together, the genre diversity, multicultural heritage, neighbourhood identities and grassroots ethos articulated by respondents form a unified picture of what makes Birmingham's music culture distinctive.

Audiences consistently resist any attempt to define the city through a single genre or a narrowly curated narrative. Instead, they advocate for an experience that reflects the full breadth of Birmingham's musical life: one that incorporates diasporic influences, cross-genre experimentation, grassroots venues, neighbourhood storytelling, and a deep appreciation of the city's global musical contributions.

This integrated perspective suggests that a successful Birmingham Music Visitor Experience must be plural, place-based, and narrative-led, enabling visitors to engage not only with the music itself but with the people, communities, and urban histories that produced it.

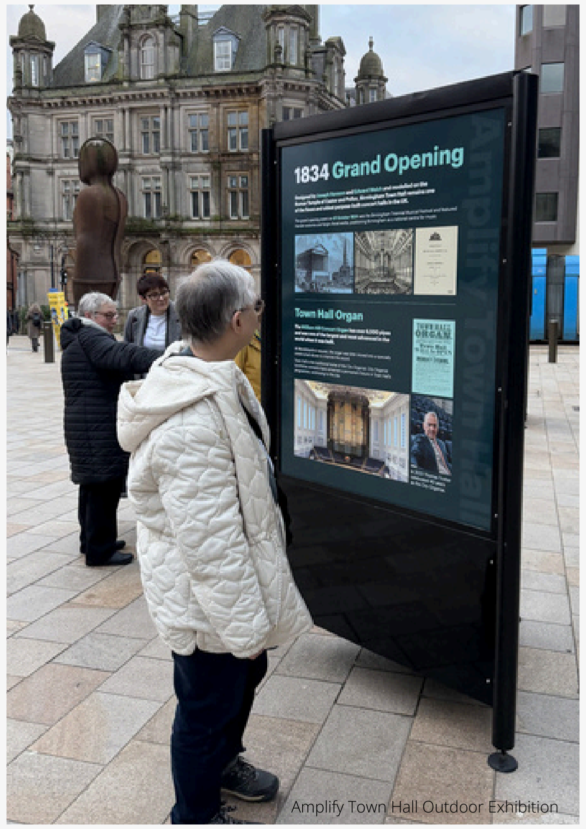
Such an approach would meet audience expectations by honouring Birmingham's authentic cultural ecosystem—one defined by diversity, creativity, and the interplay of local and global influences.

Birmingham Music Archive Walking Tour

Beyond The Bricks of Brum | Symphony Hall




Mural | Handsworth Park




Amplify Town Hall Outdoor Exhibition


The History of Grime A-board

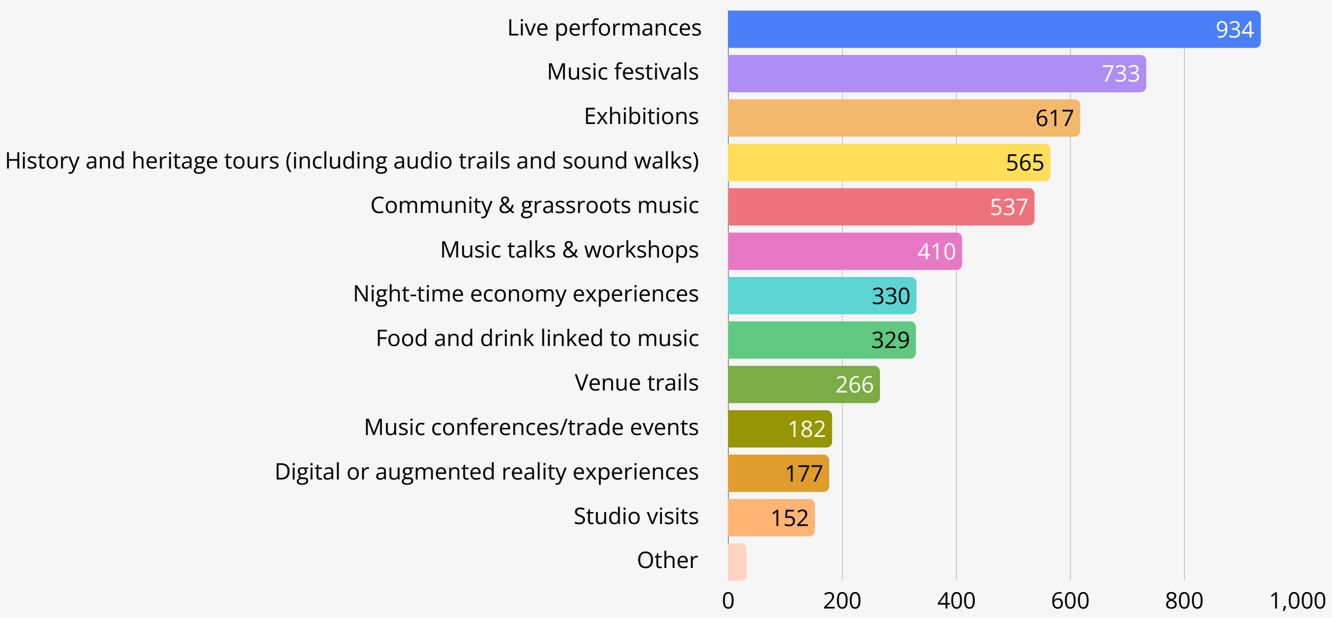
# MOTIVATIONS FOR VISITING BIRMINGHAM FOR MUSIC

Survey data demonstrates a clear hierarchy of motivations that shape why people would choose to visit Birmingham for a music-related experience. Whilst respondents claimed heritage related experiences are limited, there is a clear appetite and potential to develop them as part of a hybrid offer.

Live performances emerge as the strongest draw, selected by 934 (92%) respondents, reinforcing Birmingham's position as an established live-music hub with a dense network of venues at multiple scales (from grassroots rooms to arenas; see: Birmingham Music Ecosystem Overview).

Music festivals follow closely, attracting 733 (72%) respondents, signalling continued appetite for multi-day and multi-artist events that blend performance with social experience (Figure 5).

**Figure 5. When you think about a "music visitor experience" in Birmingham, what would you expect it to include? Which of the following would most interest you? (Select up to five)**




A significant proportion of respondents select "exhibitions" (61%) and "history and heritage tours (including audio trails and sound walks)" (56%) as experiences that would interest them, signalling a strong appetite for forms of engagement that go beyond live performance alone.



These findings suggest that many visitors actively seek opportunities to contextualise Birmingham's music within broader cultural narratives. Respondents repeatedly emphasise a desire to understand the stories behind the music, including the lives of key artists, the evolution of local genres, and the social histories embedded in neighbourhoods such as Aston, Handsworth, Digbeth, Balsall Heath, Kings Heath, and Moseley. Heritage-based engagement is therefore not a niche preference but a mainstream expectation.

Across the dataset, large numbers highlight community and grassroots music as essential components of any Birmingham-focused cultural offer (53%). Neighbourhood venues, do-it-yourself spaces, small independent clubs, and longstanding local pubs are cited repeatedly as places where scenes emerge organically and where cross-cultural interaction has historically taken place. These preferences reflect a wider sentiment—observed throughout the qualitative responses—that Birmingham's authenticity lies in its neighbourhood-level cultural production.

> NEIGHBOURHOOD VENUES, PUBS AND SMALL INDEPENDENT CLUBS ARE WHERE BIRMINGHAM'S MUSIC SCENES ACTUALLY FORM—THESE SPACES ARE THE HEART OF IT.
>
> Respondent ID 381; Q: What would make a music experience distinctive?

> A STRONGER VISITOR EXPERIENCE SHOULD LINK A MAJOR ANCHOR ATTRACTION WITH BIRMINGHAM'S WIDER GRASSROOTS ECOSYSTEM—NEIGHBOURHOOD VENUES, LOCAL ARTISTS, AND SMALL COMMUNITY SPACES.
>
> Respondent ID 820; Q: What opportunities could a stronger music visitor experience create?

Taken together, these patterns suggest that an effective visitor experience would need to offer narrative depth and geographical grounding, enabling people to connect with music not only as sound but as a place-based cultural process, rooted in stories, communities, and the lived texture of Birmingham's neighbourhoods.

The findings show that motivations to visit Birmingham for music extend well beyond attendance at individual performances. Visitors are drawn to an experience that integrates live events, festival environments, exhibitions, and heritage-led storytelling, alongside a strong interest in community-based and grassroots expressions of culture. This highlights that Birmingham's appeal lies not only in what happens on its stages but also in the wider ecosystem of places, histories, and neighbourhood identities that give the city its distinctive musical character.

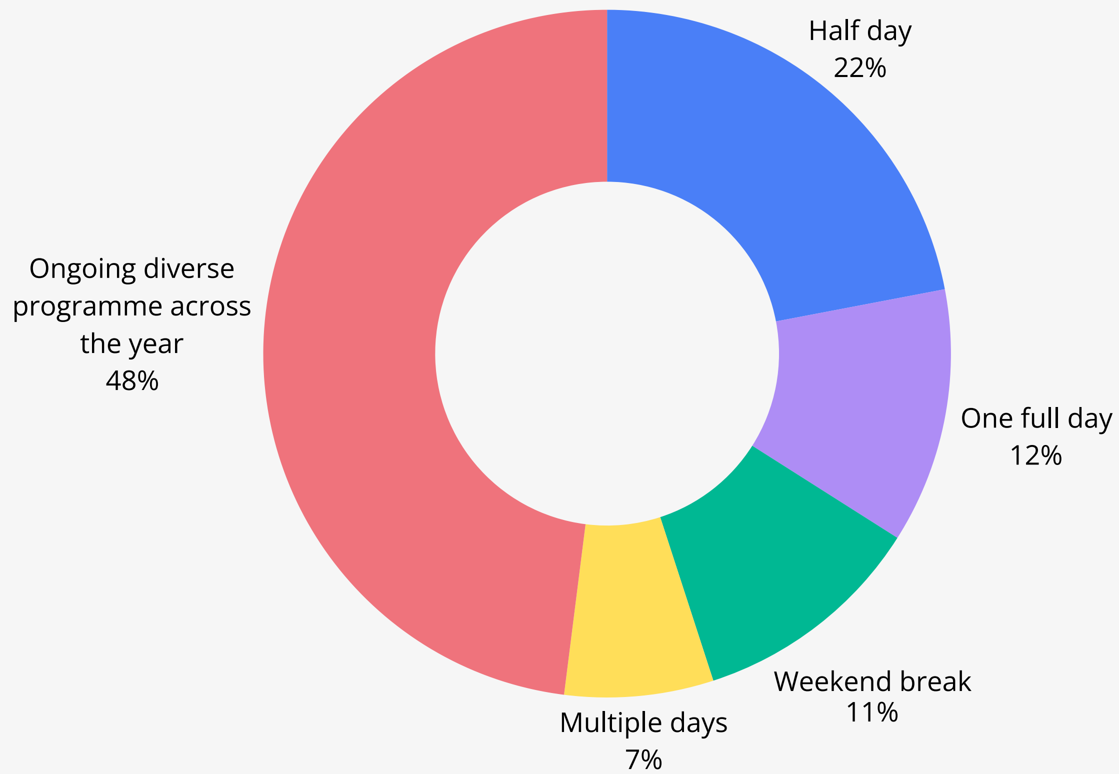
# EXPERIENCE DESIGN: DURATION, FORMAT & GEOGRAPHY, AND A WIDER CULTURAL OFFER

## Flexible Duration and Modes of Engagement

Survey responses show strong demand for a visitor experience that allows for flexible, personalised engagement with Birmingham's music offer. Almost half of respondents (48%; Figure 6) indicate a preference for an ongoing year-round programme, favouring a model that can be revisited multiple times rather than a single time-limited attraction. A further 22% prefer a half-day experience, while 12% favour a full-day format; the remainder opt for weekend-long or multi-day options.[1]

This distribution highlights the importance of offering formats that can accommodate different levels of familiarity, time availability, and depth of interest. Many respondents also reflect that flexibility should allow visitors to encounter the "real Birmingham"—its neighbourhood scenes, grassroots venues, and multicultural identity—rather than only its major attractions.

**Figure 6. How long would you expect a Birmingham music experience to last?**






[1] It should be noted that respondents may have interpreted the question on expected duration in different ways. Those selecting "ongoing, diverse programme across the year" may have been expressing support for a permanent, continually refreshed music offer for the city as a whole, whereas those choosing "half-day" or "full-day" options may have understood the question in terms of the duration of their own individual visit or activity. This potential difference in interpretation does not undermine the overall pattern of preferences, but it does suggest some caution when comparing the "ongoing" option directly with shorter, time-bounded formats.

## Hybrid Formats: Combining Single Destinations with Multi-Site Exploration.

AUDIENCES WANT A CONNECTED CITY, NOT A SINGLE DESTINATION.

Respondents also demonstrate a clear preference for a hybrid experience design that blends a recognisable central destination with opportunities to explore the broader city.

When asked to choose between a single major destination, a city-wide trail, neighbourhood-based experiences, or a combination of all three, the majority opted for the combined model (61%).

This suggests that Birmingham's musical identity cannot be contained within a single flagship site. Rather, visitors expect a distributed experience that connects a central anchor (e.g., Digbeth, the city centre, or a major exhibition hub); neighbourhood trails linked to specific genres or historical periods; and self-guided or curated routes connecting heritage pubs, independent venues, and sites linked to major artists or movements.

This hybrid approach reflects the city's spatially dispersed music ecosystem (see: Birmingham Music Ecosystem Overview), where scenes emerge organically across different districts rather than clustering around a single cultural centre. Together, these preferences indicate that visitors want an experience rooted in place, history, and urban texture, rather than a single centralised attraction.

# EXPERIENCE DESIGN: DURATION, FORMAT & GEOGRAPHY, AND A WIDER CULTURAL OFFER

## Beyond Music: Food, Drink, and the Evening Cultural Landscape

Visitors position Birmingham's culinary offer and evening settings as integral complements to the music experience, not peripheral add-ons. In the motivations hierarchy, a notable share of respondents point to the city's lively evening atmosphere and food & beverage offer as factors that would attract them to visit for music—evidence that audiences evaluate destinations on the quality of the night-time environment as much as on the performance itself (Figure 7).

Crucially, when asked how they would structure a music-led visit, food and nightlife emerge as the single most common combination choice (44%) ahead of all other pairings, confirming that audiences plan to weave dining and evening social settings into their itineraries (Figure 8).

FOOD AND NIGHTLIFE ARE CENTRAL TO THE MUSIC EXPERIENCE.

Alongside this, there is substantial interest in combining music with heritage and museums, while smaller but meaningful groups plan to add shopping, nature/canals, or sport. Read together, these patterns show that visitors conceive of a multi-layered urban experience, with food and evening culture operating as a primary amplifier of the core music offer.

The qualitative data reinforce this expectation. Some respondents explicitly call for programming that links central attractions with the grassroots ecosystem, allowing audiences to flow from concerts into neighbourhood venues and independent spaces, including local food and informal gathering spots.

Others note that whether the evening extends beyond the performance depends on practical enablers—particularly affordability, a sense of safety, and reliable late-night transport—which shape dwell time and secondary spend.



Figure 7. What would most attract you to visit Birmingham for a music-related experience?

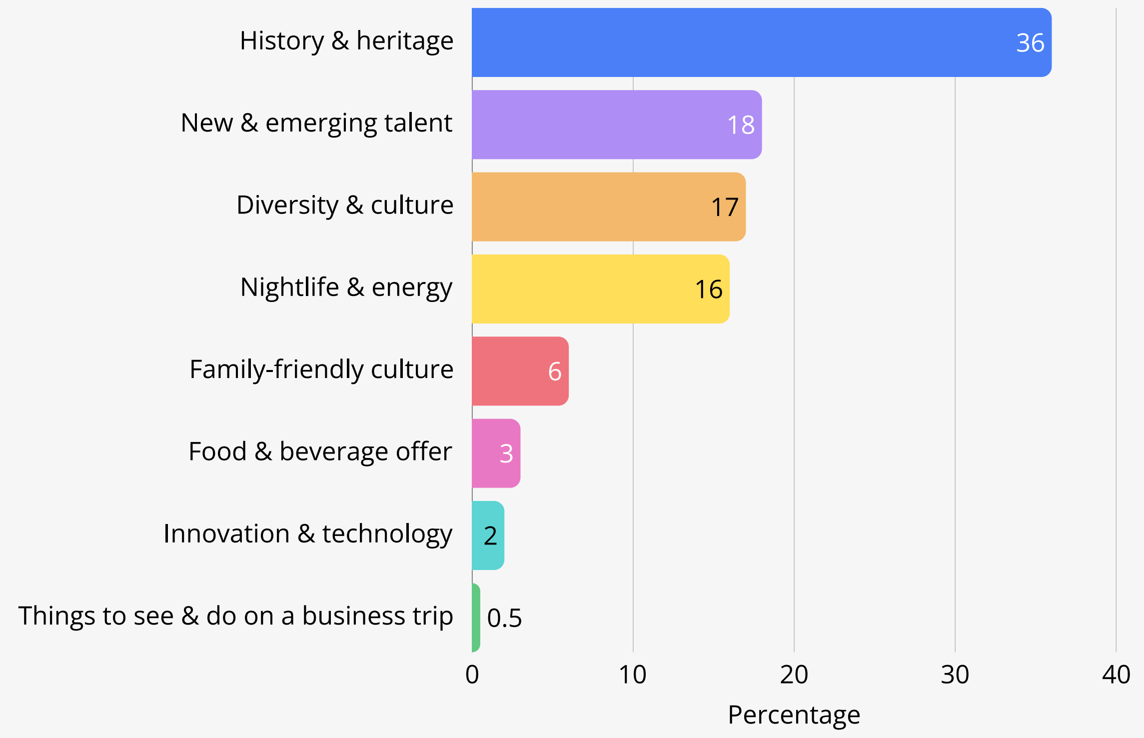
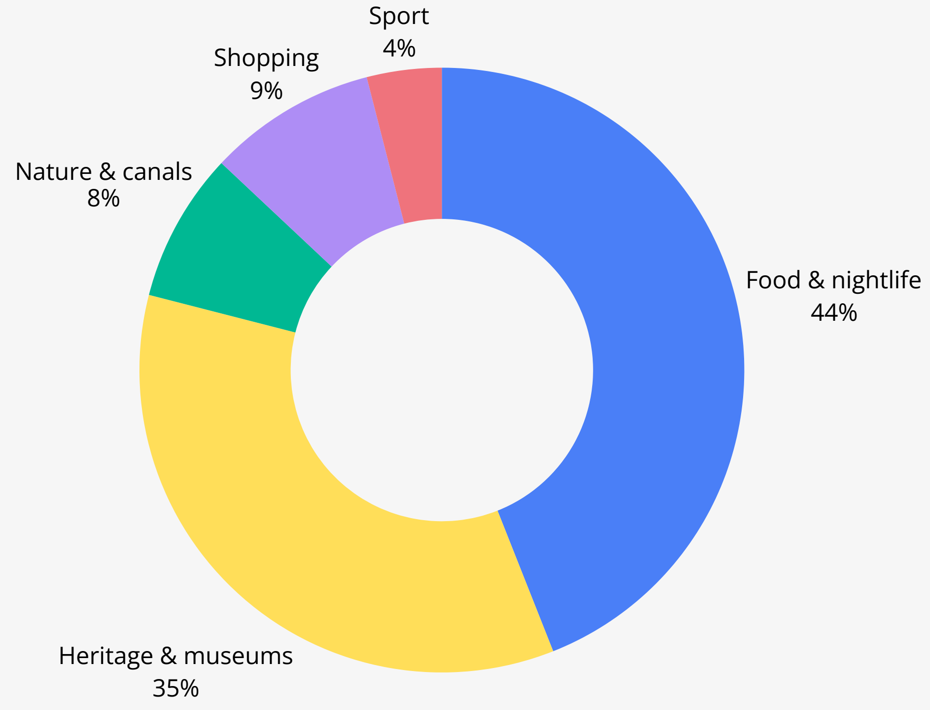



Figure 8. Would you combine music with other activities in Birmingham? If so, which?



# EXPERIENCE DESIGN: DURATION, FORMAT & GEOGRAPHY, AND A WIDER CULTURAL OFFER

## Design Implications

An effective Birmingham Music Visitor Experience must therefore be designed across multiple layers, with food, evening culture, and neighbourhood settings positioned as central—not peripheral—components of the offer.

This means actively surfacing and signposting music-adjacent food options—from independent restaurants and street-food markets to brewery taprooms, non-alcohol spaces and late-opening cafés—as part of the same itineraries that guide visitors through gigs, heritage trails, and neighbourhood routes.

It also requires making night-time logistics legible and accessible, including clear late-night transport information, last-service times, and safe walking routes, so visitors can confidently extend their stay beyond the performance itself (see: Barriers, Risks & Challenges).

Taken together, these findings underline that audiences want an experience that goes beyond "attending a gig," enabling them to move fluidly between musical heritage, live performance, local food cultures, and neighbourhood exploration.

Designing the visitor experience through this multidimensional, place-anchored lens not only aligns with audience expectations but also amplifies Birmingham's core strengths as a diverse, locally grounded, and culturally vibrant music city, where music, place, and evening culture naturally intertwine and are accessible and safe.

The open-ended responses on other cities visited for music experiences (Q15) demonstrate that participants come from, and travel to, a wide geographical spread of destinations ranging from major UK music centres such as London, Manchester, Liverpool, Bristol, Glasgow, and Edinburgh, to international trips across Europe and beyond. Respondents reference experiences in cities known for their strong music identities—often highlighting scenes, infrastructure, and communication models they found effective elsewhere.

This breadth of comparison underscores that Birmingham's audiences are not insular: they are experienced cultural travellers who draw on a rich set of reference points when evaluating what makes a music city distinctive. Their reflections reveal that Birmingham is assessed against a global benchmark, and that expectations for a Birmingham Music Visitor Experience are shaped by what respondents have seen work well in other cities, as well as by gaps they perceive locally.




Birmingham Light Festival | Lower Temple St

# COMMUNICATIONS, DISCOVERY & VISIBILITY

## How People Hear About Music Experiences

Survey responses indicate that audiences rely on a diverse but recognisable set of communication channels to find out about music experiences in Birmingham.

The most frequently cited sources are social media platforms (91%), followed by music-specific platforms and apps (76%), confirming the central role of digital discovery in contemporary music engagement. Alongside these, respondents also identify tourism websites (62%), word of mouth (64%), cultural organisations (55%) and community groups (45%) as important means of staying informed.

For visitors from further afield (broader West Midlands, UK and international in particular), hotels and venues serve as key information points, reflecting the tendency to seek guidance from places they already trust or physically encounter during their stay.

Collectively, these channels dominate the city's information ecosystem and highlight a strong dependence on decentralised, platform-driven discovery, where audiences must navigate multiple sources to piece together what is happening across the city.

## Current Communication Gaps

Despite the breadth of existing communication channels, respondents repeatedly report difficulty in finding clear, reliable, and up-to-date information about music events in Birmingham. Many describe the city's promotional landscape as "fragmented", noting that information is dispersed across numerous social media pages, venue websites, mailing lists, and informal community networks.

A substantial number of respondents compare Birmingham unfavourably with other UK cities—particularly Liverpool, Manchester, Bristol, Glasgow, and London—which they perceive as having more cohesive, visible, and user-friendly music communication ecosystems. Participants stress that this fragmentation does not only affect tourists: residents themselves report missing events because they were unaware they were taking place, or "heard about them only after the fact".

This lack of visibility therefore acts as a material barrier to music engagement, affecting event attendance, visitor planning, and the city's ability to project a confident, unified cultural identity.



## Central Information Hub

Across the qualitative responses, there is a strong and recurring call for a central, trusted, and comprehensive "What's On" platform for Birmingham's music offer.

Respondents express a desire for a single, clearly branded hub that brings together information on: live performances, festivals and large-scale events, grassroots and community-based music activity, music-heritage initiatives, neighbourhood-level happenings, and educational or workshop opportunities.

Such a platform is viewed not merely as a convenience but as a necessary component of a functioning music ecosystem—one that can overcome current fragmentation, increase discoverability, and serve both visitors and residents with equal effectiveness.

Qualitative comments emphasise that centralisation would improve planning, increase attendance, and strengthen the city's cultural narrative, helping Birmingham "shout louder" about its music identity. Respondents also note that a single, authoritative platform would enhance the visibility of smaller venues and emerging artists, who are often overshadowed in a crowded and uncoordinated informational landscape.

## Synthesis: Communication as Cultural Infrastructure

Taken together, the findings illustrate that communication is itself a form of cultural infrastructure—as critical to a successful Birmingham Music Visitor Experience as venues, programming, or transport.

Audiences want an ecosystem where discovery is simple, visible, and coherent, allowing both residents and visitors to navigate the city's music offer confidently without relying on insider knowledge.

Strengthening communication and discoverability therefore stands out as one of the most important enabling conditions for a thriving music-led visitor economy. This communication also needs to resonate multi-generationally as well across ethnically diverse audiences, as a centralised message will exclude as much as it includes.

Relevance and resonance should be the foundation.

# VISITOR ECONOMY & SPENDING BEHAVIOURS

Survey findings on spending behaviours provide important insights into the economic dynamics of music-led visitation in Birmingham. They reveal not only what visitors currently spend when attending music events in the city, but also what they anticipate spending in future—offering a clear indication of the financial expectations and thresholds that shape the viability of a Birmingham Music Visitor Experience.

## Spend on Music-Related Visits to Birmingham

Responses to the question on "spending during the last music-related visit to Birmingham" (Q16) show a broad distribution across cost categories, reflecting the diversity of visitor types, event formats, and travel behaviours. Survey data show that respondents' total spend clusters substantially higher than earlier assumptions (e.g. Rozbicka et al. 2022).

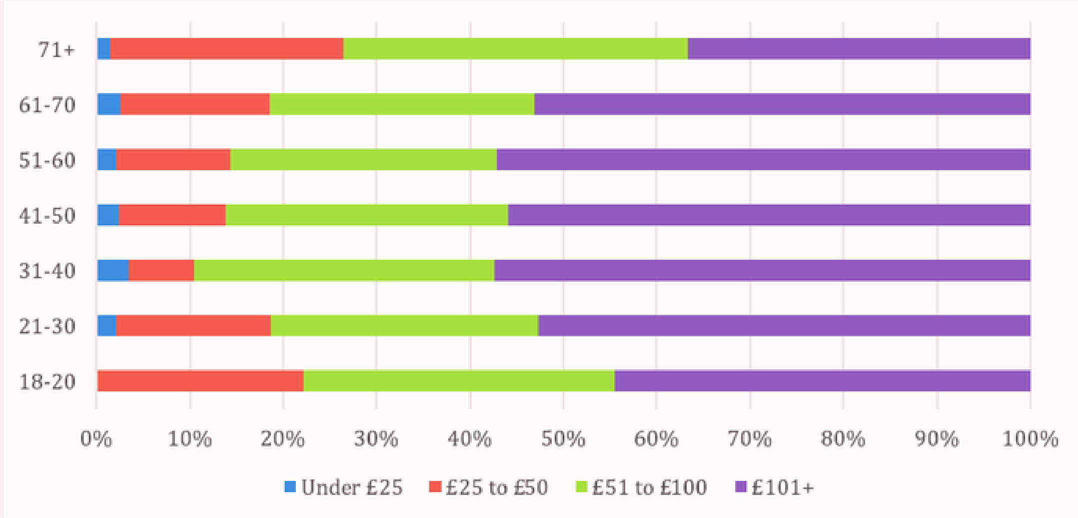
The average spend per person is £142.24, situated between a minimum estimated average of £79.98 and a maximum of £204.48. When grouped into spend bands, only a small proportion spend nothing, under £25 (2.4%) or £25-£50 (13.52%), whereas 29.8% spend £51-£100, and the largest share—54.3% of all respondents—report a total spend above £101 across tickets, transport, food and drink, merchandise, and accommodation.

Analysis of spending across age groups (Figure 9) shows a clear and consistent progression toward higher total spend as age increases. Excluding the values for youngest respondents (18-20) due to low response rate (9 respondents), among those aged 21-30 spending begins to tilt upward, with nearly half (48 of 91) already in the highest category. From 31-40 onwards, high-spend behaviour becomes dominant: in this group, 57.3% respondents fall in the £101+ category, and a further 32% fall into £51-£100, meaning over 90% spend more than £50.

This pattern strengthens further in the 41-50 and 51-60 groups, where high spend is most concentrated. In both brackets, more than half of respondents are in the £101+ category (55% and 57%, respectively), with the majority of the remaining respondents in the £51-£100 band. The 61-70 group displays a similar profile, with 53% respondents reporting total spend above £101 and most others in the £51-£100 band. The 71+ group shows a slightly more balanced pattern but still leans towards higher spend: 36.7% respondents fall into £101+ and 36% into £51-£100, meaning over 70% continue to spend more than £50. Across all age cohorts, lower-spend categories (under £25 or £25-£50) remain the minority. Altogether, the table shows a strong, age-related shift towards higher total spend, with £101+ emerging as the dominant band for every group above age 30.



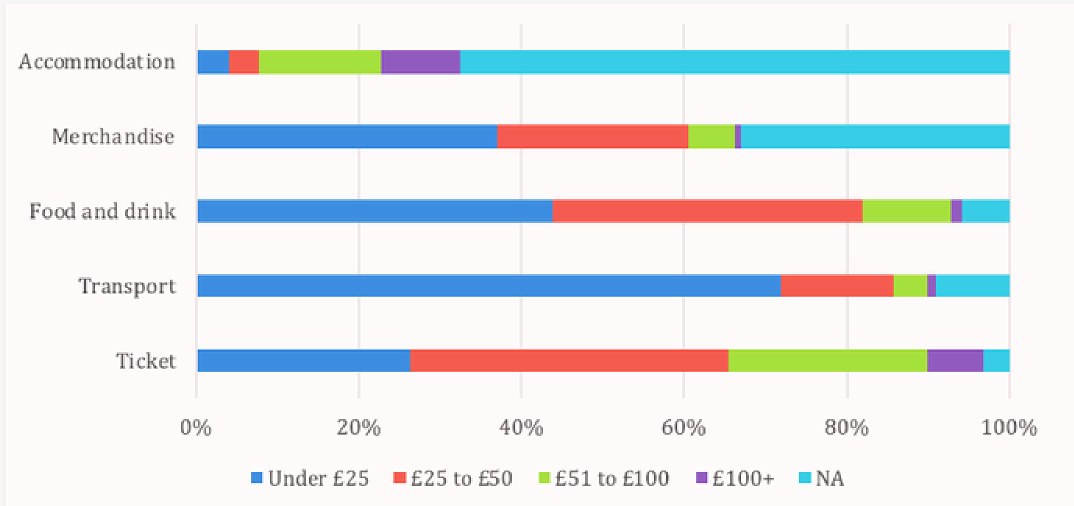
**Figure 9. Average spend per age group on music related experience (inc. tickets, transport, food and drink, merchandise, and accommodation)**




Average daily spend by category indicates that tickets and food & drink make up the core of music-related expenditure in Birmingham (Figure 10). On average, respondents spend ~£46 on tickets and ~£31 on food & drink, with transport contributing ~£20 and merchandise ~£28 among purchasers. Accommodation shows the highest mean (~£78) but applies to a smaller subset of respondents, reflecting that many do not stay overnight.

Distributionally, ticket spend clusters in the £25-£50 and £51-£100 bands, food & drink splits between under £25 and £25-£50, and transport is most often under £25—consistent with a predominantly local/regional audience that nevertheless generates meaningful secondary spend around events.

**Figure 10. Approximately, how much did you spend on yourself (i.e. excluding partners, friends) PER DAY when attending the last music related event/activity that you went to in Birmingham (in £)?**



# VISITOR ECONOMY & SPENDING BEHAVIOURS

Spending patterns across age groups (Figures 11 A-E) show distinct, category-specific trends.

For tickets, younger respondents (18-30) cluster in the lower bands (under £25 and £25-£50; 62.5%), while adults aged 31-70 report substantially higher activity in the £51-£100 range, with particularly strong mid-band spending (i.e. £25-50) among the 31-40 (37.7%) and 61-70 groups (33.3%).

Transport spending remains low across all ages, with the vast majority paying under £25 (74-85% in various age groups), though ages 31-40 show the most notable share of £51-£100 spend (18%).

Food and drink reveals a clear progression: under-30s cluster heavily in under £25, but the 31-50 groups shift markedly into the £25-£50 and £51-£100 bands, indicating higher in-city consumption among mid-career adults.

Merchandise purchases show much lower participation overall, with high “not applicable” rates—especially among the youngest (18-20) and oldest (71+). However, when 18-20-year-olds do buy merchandise, they disproportionately select £51-£100, whereas older groups overwhelmingly remain in under the £25 band.

Accommodation spending applies only to a minority in every age group, but where it does apply, ages 41+ are far more likely to fall into the £100+ band, while ages 21-40 concentrate in the £51-£100 band.

Collectively, these patterns indicate that while younger visitors keep costs low across categories, mid-life groups exhibit the highest overall event-related spending, and older visitors show elevated high-band spend when accommodation is required.



Figure 11A. Tickets — % of respondents per age group in each spend band

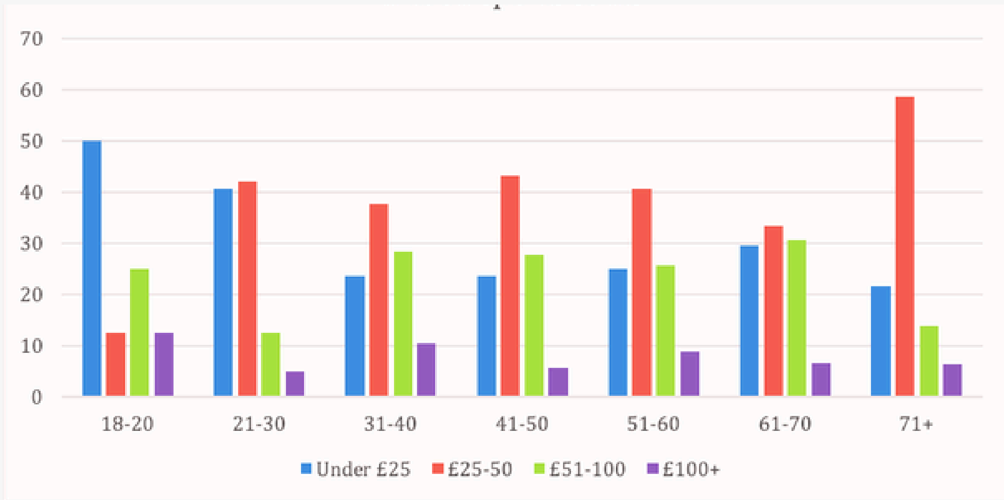



Figure 11B. Transport — % of respondents per age group in each spend band

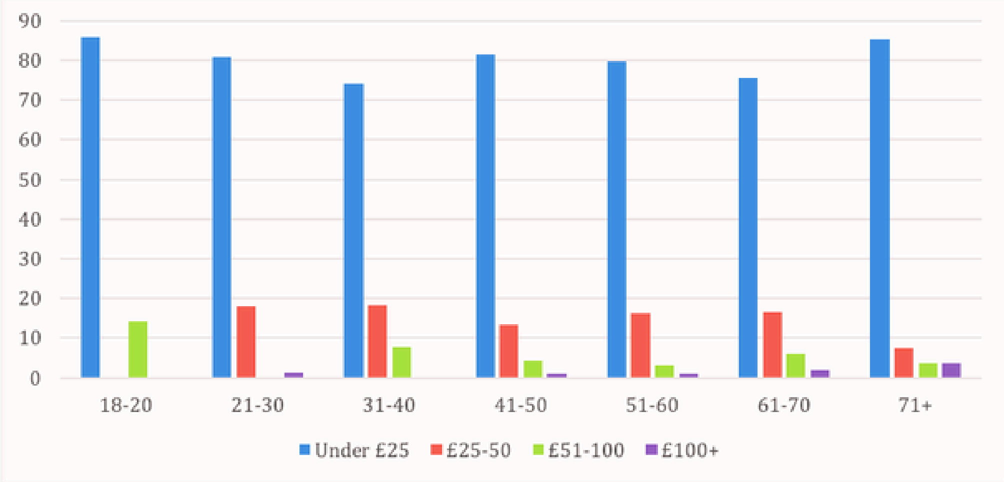
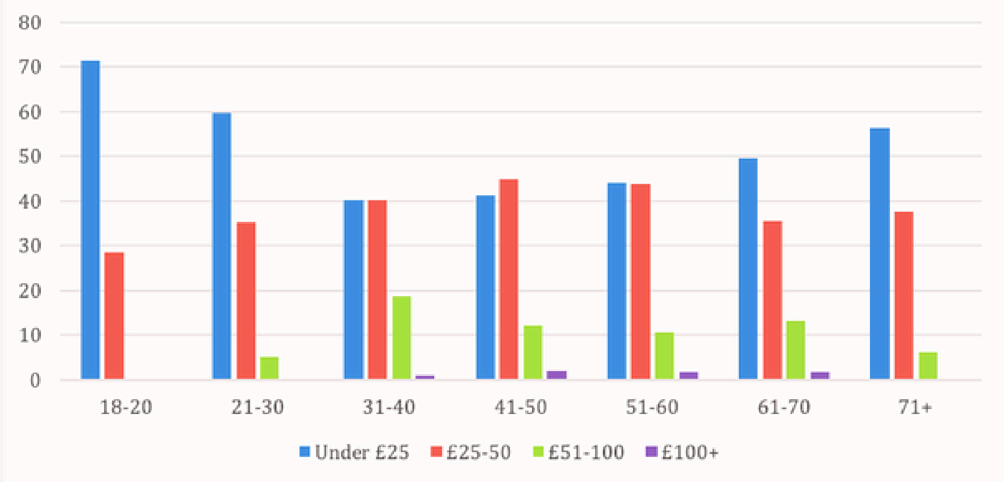



Figure 11C. Food & Drink — % of respondents per age group in each spend band



# VISITOR ECONOMY & SPENDING BEHAVIOURS

Figure 11D. Merchandise — % of respondents per age group in each spend band

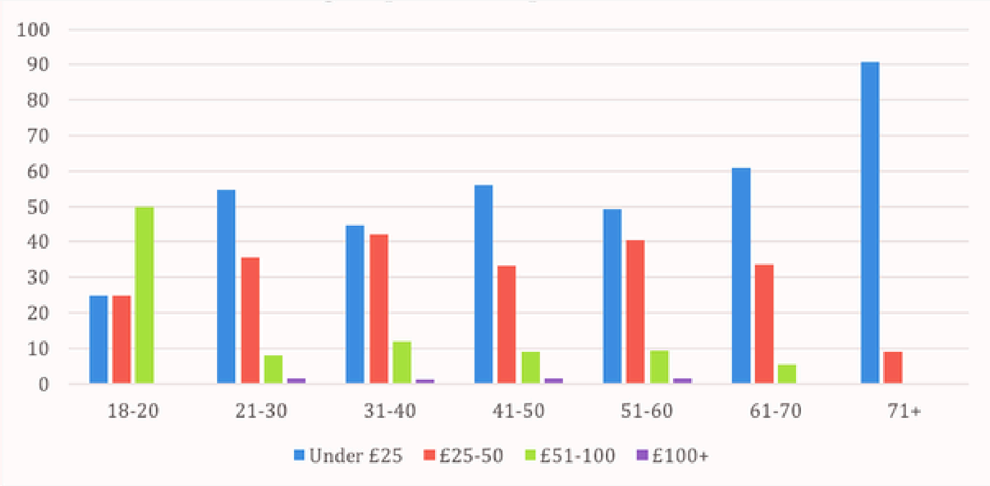
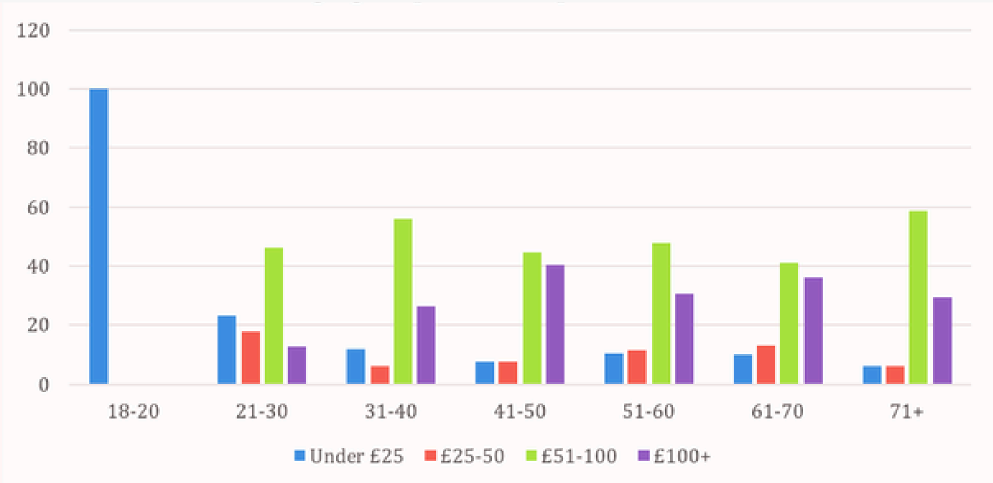



Figure 11E. Accommodation — % of respondents per age group in each spend band




SPENDING VARIES BY AGE, WITH MID-LIFE GROUPS DRIVING THE GREATEST VALUE.



## Comparison of 2020 and 2026 Spending Patterns

A comparison between the 2020 and 2026 survey data reveals both continuities and meaningful shifts in the spending behaviour of music audiences in Birmingham. While the 2020 survey (Rozbicka et al. 2022) was much smaller in scale (93 respondents), it nevertheless provides a useful baseline against which to interpret the significantly larger 2026 dataset (1,006 respondents).

In 2020, respondents reported spending between £5 and £190 on music-related outings, with over half (51%) spending under £45 per event. By contrast, the 2026 findings present a substantially higher expenditure profile. The average total spend per person below £50 was reported by only 15.9%, framed by a minimum possible average of £79.98 and a maximum of £204.48. Even with 20% inflation between 2020 and 2026 that is a substantial increase, especially on the lower end of the spectrum. This range illustrates both the diversity of audience behaviours and an overall upward shift in the economic intensity of music visits.

The 2020 data showed that the largest cost component for visitors was tickets (37%), followed by food and drink inside venues (26%), and food and drink outside venues (17%). While the 2026 survey does not disaggregate spend into categories in the same way, qualitative responses indicate that food, drink, and associated evening activities remain an important part of the visitor economy, particularly as part of bundled cultural itineraries. The continued role of food and night-time culture—now explicitly highlighted as a complementary motivation—suggests that non-ticket expenditures have retained, and potentially increased, their importance in shaping the broader economic impact of music visits.

The 2020 study revealed an exceptionally high average attendance rate of approximately 5 events per month, with respondents collectively attending an estimated 463 events per month across the sample. Many of these were small venue gigs, emphasising the importance of grassroots spaces to the city's music ecosystem. In 2026, while the frequency of attendance was not measured in the same terms, the high proportion of respondents who engage in music "very regularly" (62.6%) or "occasionally" (32.7%) suggests sustained or even heightened engagement levels. If combined with the higher mid-range spending brackets observed in 2026, this indicates greater overall spending intensity in the current period, with potentially higher per capita economic contribution among music active audiences.

## VISITOR ECONOMY & SPENDING BEHAVIOURS

Both datasets highlight that Birmingham attracts highly engaged, committed gig goers, but the 2026 findings point to a more economically stable and scalable visitor profile. The emergence of a strong middle spend bracket in 2026 aligns with a visitor economy that is capable of absorbing additional experience layers—heritage tours, neighbourhood trails, food and drink, or festival extensions—without requiring significant shifts in affordability expectations.

Further, when asked how much visitors would reasonably expect to spend per day on a dedicated music-led visit to Birmingham (Q17), respondents' expectations closely mirror their previous behaviours. This alignment between actual and expected spend suggests that visitors have a relatively stable sense of what a music-led trip to the city should cost. This stability creates a predictable demand environment, which may support the development of a scalable visitor offer that can be tailored to different budgets without requiring major shifts in price structures.




## Synthesis: Economic Potential

Survey findings indicate that music-related visits to Birmingham now generate significantly higher levels of economic activity than in 2020, with respondents reporting an average spend of £142.24 per person, bounded by a minimum of £79.98 and a maximum of £204.48. Spending is particularly concentrated in the £101+ bracket, which accounts for more than half of all visitors, especially those aged 31–60, who demonstrate the highest spending intensity.

When these expenditure patterns are applied across B-postcode's total live-music capacity of 188,110, the scale of the visitor economy becomes clear. If this capacity were fully utilised across a single day of music-related activity, meaning all venues operating at or near capacity, the city would generate approximately **£15 million** in direct spend under conservative assumptions. Using average spend, this rises to **£26.8 million**, and in a high-spend scenario the total reaches **£38.5 million**.

Using a more granular, bracket-weighted calculation—one that applies the actual proportions of low, mid- and high-spending visitors rather than a single uniform average—the total daily value generated by Birmingham's live-music capacity is estimated at **£19.74 million**.

This method more accurately reflects real audience behaviour by capturing the combined contributions of small-spend visitors (<£25), mid-range audiences (£25–£50 and £51-£100), and the majority of high-value spenders (£101+), offering a realistic representation of the B-postcode's day-to-day earning potential. A daily value of £19.74 million can be reasonably applied to weekend days, as these are the periods when Birmingham's live-music infrastructure reaches its highest activation levels, with fuller venue utilisation and higher-spending audiences.

While it would be inappropriate to extrapolate this figure across all 365 days of the year, applying it solely to weekends provides a more realistic estimate: with 104 high-value days annually, generating a potential **£2.05 billion** per year, even before considering seasonal peaks, festivals, or major touring events.

Collectively, these figures underline a marked post-pandemic upward shift in audience expenditure—driven by price rises, broader cultural itineraries, and deeper engagement among music-active audiences—and demonstrate the substantial economic value underpinning a scalable, multi-layered Birmingham Music Visitor Experience. Importantly, visitors' anticipated spending closely matches their actual behaviour, signalling a stable and predictable demand profile that can inform strategic investment and policy development.

## BARRIERS, RISKS & CHALLENGES

Survey responses reveal a set of structural and experiential barriers that limit the full potential of Birmingham's music offer for residents and visitors alike. These constraints—spanning transport, affordability, safety, and gaps in the city's venue infrastructure—shape not only whether people attend events, but also how long they stay, how much they spend, and how confidently they navigate the city's cultural landscape.

### Transport Reliability & Late-Night Safety

Transport and safety concerns consistently emerge as interconnected barriers shaping how people experience Birmingham's music offer. Respondents describe a night-time transport system that is difficult to rely on— last trains leaving before events finish, irregular late-night buses, high taxi costs, and confusion around Clean Air Zone requirements—echoing findings from the LMMP (2025).

These issues affect visitors and residents alike, often forcing people to cut evenings short, avoid certain venues, or limit their willingness to explore unfamiliar parts of the city after dark.

Concerns about night-time safety, particularly in the city centre and around major transport hubs, reinforce these patterns: when reliable public transport is lacking, audiences must walk longer distances, amplifiying existing anxieties and discouraging multi-venue or late-evening participation.

The effectiveness of any expanded night-time music offer therefore depends not only on programming but on the quality of the public realm, including lighting, wayfinding, and the clarity of routes that connect venues to transport nodes in a way that feels safe, visible, and accessible.



### Affordability & Price Sensitivity

Many respondents express concern about the rising costs associated with a music-led visit, including tickets, transport, parking, food, and drink. While the majority anticipate spending £25-£50 or £51-£100 on a typical day (Q16 & 17), secondary costs can quickly make an evening prohibitive.

For some, price and transport issues compound one another: when public transport is limited late at night, the cost of taxis becomes a barrier, particularly affecting younger people, those travelling from suburban areas, and audiences who rely on public transport.

### Synthesis: How Barriers Interlock and How They Shape the Experience

These barriers rarely operate in isolation; instead, they form a chain of interlocking constraints. Transport challenges heighten safety concerns and affordability issues make travel decisions more consequential; these structural gaps shape the lived experience of music goers in Birmingham. The qualitative responses vividly illustrate this interplay. As one participant puts it:

> PEOPLE IN SUBURBS DON'T VENTURE INTO THE CITY SO MUCH DUE TO COST AND DISTANCE... IT'S STOPPED ME GOING TO GIGS/CLUB NIGHTS BEFORE DUE TO EXPENSE.
>
> Respondent ID 286

The accounts show that barriers are not merely logistical inconveniences—they have cultural, social, and experiential consequences, shaping which parts of Birmingham feel accessible, how long visitors stay, and how deeply they engage with the city's music ecosystem. Tackling these challenges is therefore essential to enable a thriving, inclusive, and sustainable music-led visitor offer.

## BARRIERS, RISKS & CHALLENGES

The roundtable findings reinforce the public survey: **Birmingham's challenge is not a lack of music activity, ambition, or audience appetite, but a set of systemic conditions that prevent this activity from cohering into a strong, navigable visitor experience.**

**Fragmentation remains the defining constraint**: rich cultural content exists across venues, neighbourhoods, communities, and archives, but without coordinated programming, infrastructure, communication, governance, and visitor experience design, these assets will remain disconnected.

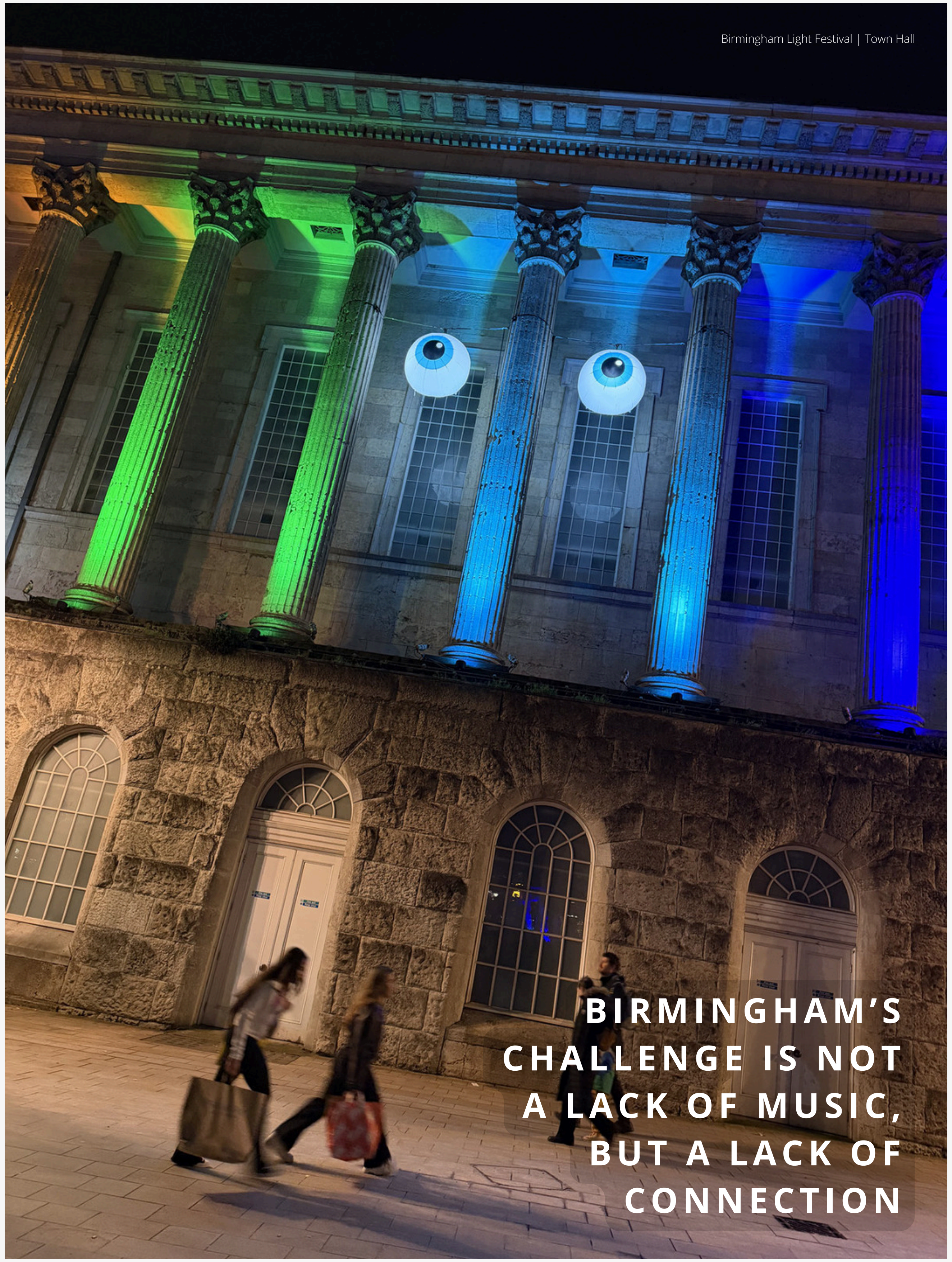
This **lack of coordination produces visibility gaps,** leaving both residents and visitors struggling to discover what is happening across the city's diverse music landscape at any given time.

**Transport and mobility limitations further compound these issues.** Late-night connectivity is inconsistent and movement between neighbourhoods is not always intuitive or perceived as safe. This directly affects dwell time, reduces multi-venue journeys, and makes distributed cultural experiences harder to realise.

**Venue fragility is a real risk to Birmingham's music visitor economy.** Grassroots and mid-scale venues underpin Birmingham's cultural authenticity yet operate under financial pressure. Without them the authenticity and depth of Birmingham's musical identity is threatened.

There is also **an infrastructure gap in heritage interpretation.** Much of Birmingham's music history is held in private collections, community archives, and informal networks. These assets are culturally significant but not systematically preserved, interpreted, or made accessible, reinforcing the sense that the ecosystem lacks a clear narrative spine.

Finally, **governance remains diffuse, with no single coordinating body empowered to align strategy, marketing, cultural programming, and transport planning.** These issues are interlocking, addressing them in isolation will have limited effect. A stronger more coherent system, one that recognises the plurality of Birmingham's music cultures, connects live music experiences to exhibitions, walks, tours and hybrid formats, and avoids reductive assumptions about genre or audience, offers the greatest potential for overcoming these barriers and unlocking a truly inclusive, city-wide music visitor offer.



# Music Tourism: Case Studies

This research arrives at a time when cultural tourism—particularly music-led tourism—is increasingly recognised as a major force in urban development strategies. UK Music reports that music tourism generated £10 billion for the UK economy in 2024 and attracted a record 23.5 million music tourists, demonstrating its expanding economic and spatial significance for cities (UK Music, 2025). For Birmingham—the UK's second-largest city, and one positioned at the intersection of rich historical legacies and contemporary creative energy—the findings contribute to understanding the social, cultural, and experiential dimensions of music-driven visitation.

THE IMPLICATION IS CLEAR. MUSIC TOURISM IS NOT SPECULATIVE. IT IS A MEASURABLE ECONOMIC DRIVER WHEN SUPPORTED BY PERMANENT INFRASTRUCTURE, COHERENT GOVERNANCE, AND CONFIDENT NARRATIVE POSITIONING.

Global comparators illustrate that music tourism succeeds when identity, infrastructure, and governance align. The project team looked at a number of cities from across Europe and America and how they used music as a central part of their cultural offer. We also spoke to Kevin McManaus, Head of UNESCO City of Music in Liverpool, about his role and Liverpool's approach as a model of good practice.



## Interview, Kevin McManus, Head of UNESCO City of Music

The interview with Kevin McManus, Head of UNESCO City of Music in Liverpool, provides a valuable comparative perspective on how a major UK city has developed its music visitor economy, and the practical implications of UNESCO designation. McManus occupies a hybrid role that bridges local government and the music industry, being employed by Liverpool City Council while working closely with the Liverpool City Region Music Board and, more recently, within economic regeneration structures. This positioning is critical, requiring both industry credibility and the ability to navigate public sector governance. As highlighted in the interview, effective music leadership depends on this dual expertise, enabling trust with the sector while aligning activity with civic priorities.

Liverpool's experience demonstrates that achieving UNESCO City of Music status does not, in itself, guarantee immediate transformation. Although the city secured designation in 2015, McManus noted that for several years the status had limited practical impact due to constrained resources and competing priorities. This challenges assumptions that such recognition automatically translates into strategic delivery or visitor economy growth. Instead, Liverpool's trajectory has been gradual, shaped by a combination of opportunistic development and later strategic consolidation.

A key turning point came with Liverpool's hosting of the Eurovision Song Contest in 2023. McManus identified Eurovision as a catalyst that significantly shifted political and institutional attitudes towards music. The event demonstrated the scale of economic and cultural value that music can generate, alongside its capacity to attract global attention and support wider cultural programming. In response, the city strengthened its music branding, introduced new platforms such as the Liverpool Music City website, and embedded music more clearly within its economic and cultural strategies. Importantly, Eurovision functioned not simply as a standalone event, but as a mechanism for unlocking longer-term strategic alignment and investment.

Liverpool's broader model is strongly event-led, building on a legacy established during the 2008 European Capital of Culture. The city has consistently used major events and festivals as anchors for wider programming, adopting an approach described by McManus as "having big events and building on the back of them". This includes international events and more targeted initiatives, such as programming activity around major touring artists. The example of "Taylor Town", developed alongside Taylor Swift's performances, illustrates how relatively low-cost interventions can generate high visibility and support local business participation. This approach emphasises amplification rather than creation, leveraging existing demand to enhance the visitor offer.

At the same time, Liverpool recognises the importance of permanent attractions in structuring the visitor experience. Sites such as The Beatles Story and other heritage locations provide essential anchors for tour operators and visitors, offering consistent points of engagement. However, McManus also cautioned against over-reliance on static cultural infrastructure, noting the risks associated with large-scale permanent developments. Instead, he highlighted the potential of hybrid models combining fixed assets with rotating or immersive experiences, allowing for greater flexibility and sustained visitor interest. Overall, Liverpool's experience reinforces several key considerations for Birmingham.

BMAG Reopening | © Birmingham Museums Trust



UNESCO DESIGNATION SHOULD BE UNDERSTOOD AS A PLATFORM RATHER THAN AN ENDPOINT, REQUIRING ACTIVE STRATEGY AND INVESTMENT TO REALISE ITS POTENTIAL. MAJOR EVENTS CAN PLAY A CRITICAL ROLE IN CATALYSING CHANGE, WHILE TARGETED FUNDING AND GOVERNANCE STRUCTURES ARE ESSENTIAL TO SUSTAINING IMPACT. CRUCIALLY, THE INTEGRATION OF EVENTS, HERITAGE, AND MARKETING PROVIDES A MODEL FOR BUILDING A COHERENT AND GLOBALLY RELEVANT MUSIC VISITOR ECONOMY.

## Liverpool: Permanent Anchor Model

UK Music's IMAGINE (2014) report identifies Liverpool as a leading UK example of music heritage translating into sustained economic value. Beatles-related tourism in Liverpool has previously been estimated at around £70 million annually (UK Music, 2013).

More recent Liverpool City Region data indicates that The Beatles remain the city's primary international tourism driver within a visitor economy now worth over £5 billion per year. Visitor numbers exceed 250,000 per year at The Beatles Story alone, with a high proportion of international visitors.

Delivery involves a mix of public and private partners, including Liverpool City Council, the Liverpool City Region Combined Authority, National Museums Liverpool, and private operators such as The Beatles Story.

The financial model combines commercial ticketed attractions, private investment, and public sector support for place branding and infrastructure.

## Nashville: Integrated Music Economy

Nashville positions music as economic policy. With more than 16 million annual visitors and visitor spending exceeding $9 billion, music-related attractions contribute significantly to the local economy (Nashville Convention & Visitors Corp, 2023).

The Country Music Hall of Fame and Museum attract over one million visitors annually.

Music infrastructure, business incubation, and live venue protection are embedded in city policy.

Key partners include the Metropolitan Government of Nashville, the Nashville Convention & Visitors Corp, the Country Music Association, and a strong network of private music businesses.

The model is underpinned by a hybrid of public policy investment, tourism taxation, private sector revenue, and philanthropic contributions to major institutions.

## Austin: Festival Clustering Model

Austin's South by Southwest has generated economic impact estimates of approximately $350 million annually (SXSW, 2023).

The city integrates festival programming with year-round live music infrastructure and civic branding.

South by Southwest is delivered through a partnership between private event organisers, the City of Austin, and local cultural and business stakeholders.

The financial model is largely commercially driven through ticketing, sponsorship, and corporate partnerships, supported by civic investment in infrastructure and destination marketing.

## Berlin: Night-Time Economy Integration

Berlin's club culture has been estimated to contribute over €1.5 billion annually to the city economy (Berlin Club Commission, 2019).

Night-time economy strategy and music policy are integrated within governance structures.

Berlin's music ecosystem is supported by the Berlin Senate, Musicboard Berlin, and a network of independent venue operators and cultural organisations.

Funding combines public subsidy, cultural grants, and private revenue from venues and events, alongside policy protections for the night-time economy.

## Montreal: Cultural Festival Economy

The Montreal International Jazz Festival (2022) generates economic impact exceeding CAD $100 million annually.

Montreal's model integrates international branding, public programming, and local artist development.

The Montreal International Jazz Festival is delivered through partnerships between municipal and provincial government, tourism bodies, and private sponsors.

The financial model blends public funding, corporate sponsorship, ticket sales, and wider economic spillover from tourism activity.

## Sheffield: Low-Cost Digital Innovation

Sheffield's Uncommon People music map demonstrates cost-effective digital heritage activation through university partnerships and location-based storytelling.

The Uncommon People music map was developed through a collaboration between the University of Sheffield, local cultural organisations, and the City Council.

The model is low-cost, supported primarily through research funding, public sector contributions, and in-kind academic partnerships.

## Coventry: Grassroots Heritage Model

Coventry's 2-Tone trail and museum illustrate incremental heritage development led by local champions, demonstrating identity clarity over scale.

Coventry's music heritage offer is led by independent operators, including the Coventry Music Museum, alongside local authority support and community stakeholders.

The financial model is predominantly grassroots, combining ticket income, volunteer input, small grants, and limited public sector support.

With these case studies in mind, the next section sets out a proposed Birmingham Music Experience Itinerary, examining how barriers identified through stakeholder roundtables and the public survey currently limit its delivery, and what would be required to unlock its potential.

These cities differ in scale but share common structural characteristics: permanent infrastructure builds confidence, event clustering increases dwell time, coordinated governance reduces duplication, and clear narrative identity strengthens international appeal and brand positioning.

Taken together, these national and international case studies demonstrate that successful music-led visitor economies emerge not from cultural assets alone, but from the alignment of identity, infrastructure, and governance. Cities that convert music heritage into sustained economic value do so by pairing strong narrative clarity with permanent anchors, major event programming, and coordinated public–private leadership.

The lesson for Birmingham is clear. The city possesses the raw materials: a globally influential music history, a diverse live ecosystem, and strong diasporic cultures, but it lacks the integrated structures that allow these assets to function as a coherent visitor proposition.

# Birmingham ‘Hidden Gems’ Visitor Weekend Itineraries

How might we imagine what a Birmingham Visitor Experience might look like in practice? Using the examples from the cities above, and the model employed by The Hidden Gems of Music Tourism 2025 report (Sound Diplomacy, 2025) here are three imaginary but eminently realistic Birmingham itineraries.



## ROOTS OF REGGAE: “BASSLINES OF HANDSWORTH”

**WEEKEND FOCUS: SUNDAY - SIMMER DOWN FESTIVAL**

| | | |
|---|---|---|
| SATURDAY MORNING | Handsworth Origins Walk | Begin in Handsworth Park, where murals celebrating Steel Pulse and the area’s musical legacy set the tone. Continue to David Hines’ house, an early rehearsal space, and Handsworth Technical School, where the band first connected. These locations root Birmingham’s global reggae influence firmly in place and community. |
| SATURDAY MIDDAY | Community Food & Culture | Soho Road offers an immersive Caribbean cultural experience. Local cafés and takeaways provide not only food, but atmosphere, where reggae, dub, and soul are part of everyday life. |
| SATURDAY AFTERNOON | Black Heritage & Sound System Stories | Join the Black Heritage Walks Network for a guided exploration, including Grosvenor Road Studios. The tour reveals the infrastructure behind reggae’s growth, from sound systems to grassroots venues. |
| SATURDAY EVENING | Live Reggae & Diaspora Sounds | Experience live music at the Legacy Centre of Excellence or The Jam House, where Birmingham’s reggae heritage continues through performance. |
| SUNDAY | Simmer Down Festival | Simmer Down Festival is a flagship celebration of reggae, dub, and Caribbean culture, held annually in Handsworth Park. The festival features live bands, DJs, and sound systems alongside street food, arts, and community stalls. Designed as a family-friendly event, it reflects Birmingham’s Afro-Caribbean heritage and provides a platform for both established and emerging artists, reinforcing the city’s reputation as a global hub for reggae culture. |

## ROCK & BLUES: "FROM FOUNDRIES TO AMPLIFIERS"

**WEEKEND FOCUS: SUNDAY – BIRMINGHAM JAZZ & BLUES FESTIVAL**

| | | |
|---|---|---|
| SATURDAY MORNING | Black Sabbath Origins | Use the Brum SoundTracks app to explore Aston and the city centre, connecting sites linked to Black Sabbath and Birmingham's industrial musical roots. |
| SATURDAY MIDDAY | Music & Football Culture | Visit Aston Villa Live Warehouse, the site of Black Sabbath's final performance, where music and sporting culture intersect. |
| SATURDAY AFTERNOON | Digbeth's Alternative Scene | Explore Digbeth's creative district, including street art, the Red Brick Market, and independent venues shaping the city's contemporary music culture. |
| SATURDAY EVENING | Food & Live Music Circuit | Start at Bonehead before heading to Hare & Hounds or Scruffy Murphy's for live performances. |
| SUNDAY | Birmingham Jazz & Blues Festival | The Birmingham Jazz & Blues Festival is one of the UK's longest-running free music festivals, presenting hundreds of performances across the city. With a focus on accessibility, it brings international, national, and local artists into public spaces, bars, and cultural venues. The programme spans traditional jazz and blues through to contemporary interpretations, transforming Birmingham into a city-wide stage and encouraging exploration across neighbourhoods. |



## DESI STORIES: "BHANGRA, BEATS & BELONGING"

**WEEKEND FOCUS: SUNDAY – BIRMINGHAM MELA**

| | | |
|---|---|---|
| SATURDAY MORNING | South Asian Birmingham | Walk Soho Road with Legacy West Midlands, exploring the cultural and musical contributions of South Asian communities. |
| SATURDAY MIDDAY | Street Food & Soundtrack | Experience authentic South Asian street food while engaging with the area's everyday soundscape. |
| SATURDAY AFTERNOON | Bhangra & Fusion Heritage Trail | Visit key sites including Apache Indian's AIM Academy, highlighting Birmingham's role in global South Asian music. |
| SATURDAY EVENING | Dining & Creative Experience | Dine at Asha's before heading to Glassy 'N' Paint for a participatory creative experience. |
| SUNDAY | Birmingham Mela | The Birmingham and Sandwell Mela is one of the UK's largest South Asian cultural festivals, attracting thousands of visitors each year. The event features multiple stages of live music and dance, showcasing bhangra, Bollywood, and contemporary fusion acts. Alongside performances, the Mela offers a vibrant mix of street food, market stalls, and family activities, celebrating the diversity and ongoing evolution of South Asian culture in Birmingham. |


BMAG 2022 reopening event | © Birmingham Museums Trust

These imagined itineraries demonstrate that Birmingham already possesses the raw cultural material required for a compelling music led visitor offer: distinctive neighbourhoods, globally significant heritage, vibrant grassroots scenes and rich diasporic soundscapes. Yet the ability to turn these prototypes into an operational, bookable, city-wide experience depends not only on content, but on the systems that support it.

The next part of this section therefore moves from what a Birmingham Music Visitor Experience could look like to what conditions must be in place for it to succeed. Drawing on roundtable insights and public survey findings, we examine the enabling infrastructure: transport, governance, curation, venue stability, coordination and the visitor facing design required to transform creative possibility into a coherent, confident, and sustainable music visitor offer.

# Creating the Conditions for a Joined-Up Music Visitor Experience

## Economic Modelling Considerations for Birmingham

The survey data provides a grounded starting point for economic modelling. It suggests a stable and predictable visitor base rather than a speculative one. Average spend sits at approximately £142 per visit, with the majority of respondents spending over £100. This indicates a mid-range to high-value audience, particularly among those aged 30 and above. Importantly, expected future spend closely mirrors actual behaviour, suggesting a reliable demand profile.

However, current patterns are heavily weighted toward day visits. Overnight stays remain comparatively limited. This constrains total economic impact. The key variable is therefore dwelling time. Increasing the duration of visits, rather than simply increasing visitor numbers, is likely to generate the most immediate uplift in economic value.

Three modelling considerations emerge:

- **First, conversion rather than attraction.** Birmingham already attracts music audiences. The opportunity lies in converting single-event visits into multi-day experiences, increasing overnight stays through a hybrid multi experience visit (live music, heritage tour etc).
- **Second, secondary spend.** Food, drink, and accommodation represent the most scalable areas of growth. These are directly influenced by transport, safety, and programming alignment.
- **Third, delivery model risk.** A permanent anchor model offers higher long-term return potential but requires significant capital investment and carries delivery risk. A distributed model reduces upfront cost but may limit headline economic impact.

A phased approach allows these variables to be tested in practice. Pilot programmes, themed weekends, and packaged experiences can provide real data before large-scale investment decisions are made.



## Strategic Delivery Options

**The evidence does not support a single delivery model.** It supports a set of interlocking options that can be combined and tested.

**Heritage and narrative should form the foundation.** Birmingham's strength lies in multiple authentic interdependent music histories rather than a single dominant story. The key question is how these can be curated into a coherent, plural narrative.

**A distributed heritage model offers immediate viability.** Existing venues, neighbourhoods, and collections can be connected through trails, interpretation, and programming without requiring major capital build.

At the same time, **there is a case for selective anchor development.** This does not need to replicate Liverpool. It may focus on one or two areas of global strength where Birmingham has credibility.

**Live music infrastructure is not an add-on. It is core.** Supporting grassroots and mid-scale venues is essential to maintaining authenticity and sustaining the visitor offer over time.

**Transport and connectivity are enabling conditions.** Without improvements in late-night travel, wayfinding, and perceived safety, the experience cannot function as intended.

**Visitor economy development should focus on packaging rather than promotion alone.** Themed weekends, neighbourhood itineraries, and integrated food and music experiences align directly with audience behaviour.

The above will require **a more established network** to support development, including clear governance structures. The focus should remain on visitor development, complementing rather than replacing existing heritage initiatives. Greater clarity of purpose will help reduce fragmented or partisan approaches.

**Governance requires clarity.** A coordinating structure is needed to move from informal collaboration to structured delivery.

**These options are not mutually exclusive.** The consideration is sequencing, scale, and alignment with available resources.

## Governance and Delivery Architecture

Governance is not a technical detail. It is a determining factor in whether delivery is possible.

The current landscape is characterised by goodwill but limited coordination. Organisations collaborate, but without a shared framework, activity remains fragmented.

Three potential approaches emerge:

- **A light-touch alliance model could formalise existing relationships**. A Music Visitor Alliance would bring together key stakeholders with a clear remit, but without creating a new delivery body.
- **A civic leadership model would embed responsibility within existing structures.** This provides visibility and accountability but depends on internal capacity.
- **A hybrid model may offer the most practical route.** Strategic leadership sits within the city, supported by a cross-sector alliance that enables delivery.
- The potential **pursuit of UNESCO City of Music or Music Cities Network status introduces an additional consideration.** Both designations require evidence of coordination, international positioning, and long-term commitment. Governance structures will need to support this.

The key requirement is clarity. Without it, delivery risks remaining aspirational.



## Risk, Phasing and Investment Conditions

The primary risk is not lack of ambition. It is misalignment between ambition and delivery conditions.

Capital risk is significant. Large-scale infrastructure without proven demand or operational clarity may not deliver expected returns.

Reputational risk also needs to be considered. Positioning Birmingham as a music city without resolving underlying constraints could undermine credibility.

Operational risk centres on transport, safety, and coordination. These are not peripheral issues. They directly affect visitor experience.

A phased approach reduces exposure:

- Phase one should **focus on low-cost, high-impact interventions.** This includes improved communication, pilot itineraries, and event clustering.
- Phase two can **test packaging and partnership models,** including hotel collaborations and themed weekends.
- Phase three, if justified by evidence, may consider **capital investment in anchor infrastructure.**

Investment conditions should be tied to measurable outcomes. Dwell time, visitor spend, and repeat visitation provide practical indicators of success.

# Conclusion and Strategic Considerations

The combined evidence from the roundtables and public survey presents a clear and consistent picture. **Birmingham is not an emerging music city. It is an established one.** What is missing is not cultural substance, but the systems, structures, and narrative clarity required to translate that substance into a coherent and competitive visitor experience.

Across both datasets, there is strong alignment on three fundamental points:

- First, **Birmingham's music identity is plural, place-based, and deeply rooted in its communities.** It is shaped by the interaction of working-class histories, migration, and neighbourhood-level cultural production. Heavy metal, reggae, bhangra, jazz, gospel, punk, electronic music, and cross-genre experimentation are not parallel stories. They are interconnected expressions of the same urban fabric. Respondents and stakeholders are clear that this plurality is not a complication to be simplified. It is the city's defining strength. Any attempt to reduce Birmingham's music identity to a single narrative, genre, or flagship story risks undermining what makes it distinctive.

- Second, **there is already a highly engaged and motivated audience.** The survey demonstrates sustained participation in music activity and a strong existing pattern of music-led visits to the city. This is not a market that needs to be created. It is one that needs to be better served. Visitors are not asking for a single attraction or a curated showcase detached from the city's reality. They are asking for a way to access, understand, and navigate what is already there. They want to move between neighbourhoods, connect heritage with live performance, and experience the city through its venues, communities, and everyday cultural life.



- Third, **the constraints are structural rather than cultural.** Fragmented communication, limited coordination, transport challenges, venue fragility, and gaps in heritage infrastructure all act to suppress the potential of an otherwise strong ecosystem. These are not marginal issues. They shape how long visitors stay, how much they spend, and whether they return. They also shape how confidently Birmingham can present itself externally as a music destination.

Taken together, this points to a central strategic consideration. **The task is not to build a music visitor experience from scratch. It is to enable one that already exists in fragmented form.**

This has several implications.

- The first is that **narrative matters.** Birmingham does not lack stories. It lacks a coherent way of telling them. The evidence suggests that a successful approach will not be built around a single anchor or dominant theme, but around a structured framework that allows multiple stories to coexist and be explored. This requires curation rather than simplification, and confidence in presenting complexity and nuance as a strength.

- The second is that **connectivity is as important as content.** Audiences consistently describe a desire for hybrid experiences that combine central points of reference with wider exploration. This model is only viable if the city functions as a connected system. Transport, wayfinding, and communication are therefore not supporting elements. They are core components of the visitor experience.

- The third is that **grassroots culture must remain central.** Birmingham's music identity is sustained through independent venues, community organisations, informal networks, and small-scale activity. These are not peripheral assets. They are the foundation of authenticity. Without them, any visitor offer risks becoming detached from the lived reality of the city's music culture.

- The fourth is that **economic potential is real, but conditional.** The survey data demonstrates a stable and scalable spending profile, particularly among mid-life audiences with a higher disposable income. However, current patterns are constrained by short dwell times and limited overnight stays. Extending visits through better coordination, packaging, and infrastructure is likely to deliver greater impact than simply increasing visitor numbers.

## CONCLUSION AND STRATEGIC CONSIDERATIONS

- The fifth is that **delivery will depend on governance clarity.** Both the roundtables and wider evidence highlight the absence of a single coordinating mechanism. Without this, activity will continue to rely on informal relationships and short-term alignment. A more structured approach does not require heavy bureaucracy, but it does require defined roles, shared objectives, and visible leadership.

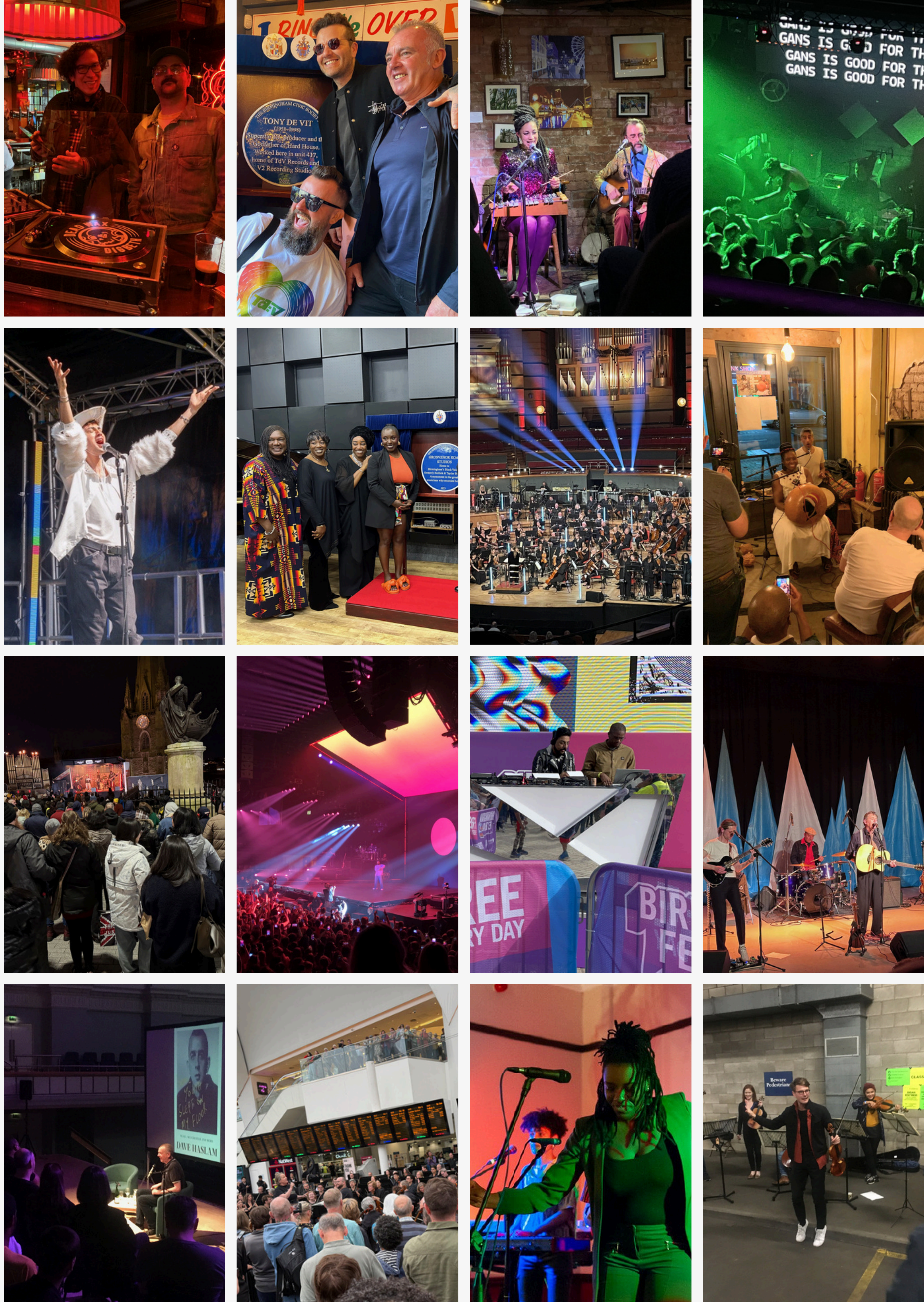
There is also a broader positioning question. Birmingham is often compared to cities such as Liverpool, Manchester, or Glasgow. The evidence suggests that direct comparison is not always helpful. Those cities benefit from clearer single narratives or longer-established visitor frameworks. **Birmingham's opportunity lies in doing something different.** A plural, neighbourhood-led, culturally embedded model may not replicate those examples, but it may offer a more contemporary and authentic alternative.

This report does not recommend a single delivery route. Instead, it sets out a series of options and considerations that reflect the conditions identified through the research. A phased approach is likely to be the most appropriate. Early interventions focused on communication, coordination, and experiences can build confidence and generate evidence. More capital-intensive decisions can then be taken on the basis of demonstrated demand and operational learning.

What is clear is that the foundations are already in place. **Birmingham has the heritage, the audiences, and the cultural depth required to support a compelling music visitor experience.** The question is not whether the city can do this. It is how it chooses to do it, and at what pace.

At its strongest, Birmingham's music story is not about individual artists or isolated moments. It is about the relationship between people, place, and sound. It is about how global music cultures have been shaped in specific streets, venues, and communities, and how those continue to evolve.

**The opportunity is to make that story legible, navigable, and economically sustainable, without losing the diversity and qualities that make it meaningful in the first place.**



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