Cardiff School of Creative & Cultural Industries

Ysgol Diwydiannau Creadigol a Diwylliannol Caerdydd

Investigating the Live Music Industry within Wales: A Critical Analysis

A Report for Welsh Music Foundation

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Foreword

According to a recent *Performing Rights Society* (PRS) report (Carey & Page 2010), the value of the UK music industry stood at 3.9bn in 2009.Within this total, live music revenues have increased 9.4%, to 1.5 bn,[1] and although this increase was less than the previous year's 13%, it is still significant considering the UK is in the middle of one of the worst recessions in living memory. Additionally, this increase is seen to take place despite fewer performances, with the PRS report indicating that the majority of major events are selling out, even with higher ticket prices. These figures corroborate statistics form *Sunderland City Council* (Debnam 2008),[2] *The Arts Council of Wales* (2005) and *Mintel* (2002),[3] all of who confirm the pervasive presence and economic importance of live music. Within the global parameters of live music, the main focus of this research, 'Popular Music' is unquestionably the driving force behind the medium's success. A genre that up until recently was gauged principally by record sales, the live popular music industry not only offers considerable financial remuneration at the top end of the market, artistic development for emerging artists, and an authentic cultural experience for its consumers, but also, in a post 'social listening culture', arguably the most pertinent way of artists cultivating the cultural 'tribes' discussed by Seth Godin (2008). As indicated in the *Arts Council of Wales*' report *Music Attendance and Participation* (2005), 39% of its sample is seen to attend at least one popular music performance per year, with 11% attending at least one performance a month. When

[1] Within this figure, primary ticket sales rose 5.8% to £957 million, secondary ticketing 15% to 172 million, and on the night spend 16% to 408 million.

[2] When investigating the viability of positioning Sunderland as a 'music city', Sunderland City Council cross reference research from a Creative Cultural Skills baseline report which confirmed that out of the 95,000 people working in the music industry, 45% worked in live music.

[3] Which indicated that 44% of students regularly attend live performances.

statistically compared to 13% for Classical concerts, 7% for Opera, and 11% for 'Folk, Traditional and World Music', Popular Music can be seen to clearly represent the most significant contribution to the Welsh economy, a fact that begs the question why it is described as 'Other' and attracts so little funding. Although a more recent publication by *The Arts Council of Wales* (2010) overtly states that it wishes to readdress this imbalance, there is still no exclusively funded popular music included in its 'Revenue funded Organisations' (RFO's), which are still dominated by the *BBC National Orchestra of Wales* and *Welsh National Opera*.[4]

When one considers the rural landscape of Wales, it seems that taking advantage of the country's potential for hosting music festivals is a prudent way of providing a quality cultural experience,[5] in addition to increasing the nation's share of the revenue live music currently generates. This cultural/economic balance could arguably be better negotiated if the 'festivalscape' of Wales included a philosophical structure that facilitates the 'three festival types' outlined by Jaeger and Mykletun (2009): commercial/profit motivated, public orientated,[6] and non profit.[7] The above mentioned PRS report estimates that Wales currently constitutes 4% of the UK's live music revenues, the equivalent of £60 million. Although on the surface this appears to be a significant sum of money, by comparison, Scotland is estimated to constitute 11%, the equivalent of £165 million. Even taking the differences of population into account,[8] it is apparent that Wales is somewhere behind Scotland in the

[4] Community Music Wales is included, but has a remit broader than popular music.

[5] For both non Welsh domiciles and the indigenous 'Staycation' generation.

[6] Which are owned by municipalities or local authorities, and profit making is sub ordinate to cultural value.

[7] Which are implemented with or without the public sector, ran by non profit organisations, and centred around the musical interests of the organisers.

[8] Wales is estimated to constitute around 5% and Scotland 8% of the UK's total population of 61,792,000.

exploitation and retention of earnings from the live music industry, and one of the recommendations of this report is to finance detailed research into how Wales compares to other small nations, and more importantly how we can learn from them.

As an ex professional musician myself, it is apparent that fees for small pub/club gigs have increased little in 20 years, with the 2004 Department of Culture Media and Sport report *A Survey Of Live Music Staged in England And Wales 2003/4* verifying that some small pubs and venues are often stifled with high overheads and low returns.[9] Although a later DCMS report entitled *Live Music: An Analysis Of The Sector* (2009)[10] describes the impact of the 2003 Licensing Act as 'Neutral',[11] the trade magazine for public houses, *The Publican* recently revealed that pub closures peaked at 52 per week in the first half of 2009, with a total of 2,365 closures by the end of that year (Wilmore 2010).[12] Although the factors contributing to this are complex and not exclusively a result of the 2003 Licensing Act, it is something that resonates with the recent closures of *The Point* in Cardiff, national festivals such as *The Celtic Blue Rock Festival* (near Llanfyrnach)*l*[13] *The Square Festival* (Ceredigion),[14] *Castell Rock* (Aberystwyth Castle), and events such as *The Big Green Gathering* (in Llanelli), and

[9] With 21% of the sample claiming it was too expensive to justify.

[10] It is important to note that the Live Music Forum pressure group (not to be confused with the Live Music Forum led by Fergal Sharkey) are very critical of many of the statistics published by the DCMS. Refer to http://www.livemusicforum.co.uk/ for more details.

[11] For a brief synopsis of the key issues surrounding the 2003 licensing Act, refer to the appendix of this document.

[12] http://www.thepublican.com/story.asp?storycode=66322

[13] See http://www.bbc.co.uk/news/10472549 This festival intends to continue next year, and in addition to offering refunds, cancelled tickets could be used at the *Teifi Roc Festival* in Cardigan (see http://www.westerntelegraph.co.uk/news/8318103.900th_birthday_festival_will_really_rock/).

[14] See http://news.bbc.co.uk/1/hi/wales/mid/8482972.stm

The Builth Wells International Bike Show, many of which succumbed to the Act's emphasis on 'people power'.[15]

As outlined by industry professionals such as Stuart Galbraith (2007),[16] Robert Sandall (2007),[17] Jackomi Mathews, (2010)[18] and Will Page (2007), the industry has experienced a infrastructural shift over the last 15 years,[19] with live music now being regarded not as a publicity vehicle for album sales, but a significant means of making money. Figures outlined earlier from the PRS corroborate this, and an important objective of this report is to ensure that Wales is in a position to not only nurture the creativity that makes live music possible, but also make sure that the necessary support mechanisms are in place to ensure that the practitioners working within this industry receive the necessary support, be it as a musician, sound engineer, venue, promoter, etc.

Ticketmaster's recent declaration that its net income was down for the quarter ending September 30th 2010[20] corroborate future predictions that the live music sector will slow down in future, with a 2010 *Edison Research Survey* (2010) revealing that fewer 12 – 24 year

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[15] It is apparent that this is a UK not a Welsh issue, with a recent edition of *The Independent* (McSmith 2010) depicting the closure of one of North London's most popular venues, (*The Flowerpot*) as being the result of a combination of the recession, rent rises and heavy regulation. The article also highlights the campaign recently launched to save one of London's oldest live music venues – *The 100 Club*, who are threatened due to rent rises.

[16] http://news.bbc.co.uk/1/hi/entertainment/6542871.stm

[17] http://www.prospectmagazine.co.uk/2007/08/offtherecord/

[18] See http://www.themusicvoid.com/2010/10/how-labels-prevent-start-ups-from-succeeding/

[19] This figure is approximate. For example *Counting The Notes* (2002) plotted a significant increase in attendances at National Association of Arena venues between 1993 and 2001, with audience figures increasing from 1,946 million to 3,668,

[20] See http://www.hypebot.com/hypebot/2010/11/live-nation-down-in-q3-promises-more-social-future-.html

olds are attending live music in America than in 2000. As indicated in a recent edition of *The Economist*,[21] much of this is related to the expediential increase in ticket prices over the last ten years (for major concerts, and ‘secondary market’ tickets), and it seems that future sustainability in the live music sector needs to focus on factors such as key stakeholders strategically working together, attracting inward investment, improving the promotion, accessibility and quality of Welsh music, and of course the organisation of more quality concerts, as opposed to ‘easy fix’ customer price increases. Despite the predicted future downturn, live music will continue to offer a potential significant income stream for the Welsh music industry, and the overarching aim of this report is to provide the foundations for a long term strategy of ensuring a successful and economically viable live music sector in Wales.

I would like to thank the numerous colleagues who contributed to this document, including those who gave their time to complete the online questionnaires and attend the various forum meetings. I would particularly like to thank those who graciously gave their time for face to face interviews and offer critical comment on early draft copies. Although too numerous to mention by name, your input is sincerely appreciated. Finally, I would like to thank John Rostron and Deian Ap Rhisiart for their direct assistance with this research, and the *Welsh Music Foundation* for accessing the funding to make it a possibility.

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[21] See http://www.economist.com/node/17963345

Executive Summary

Introduction

1.1 This baseline report was completed for the *Welsh Music Foundation* (WMF) by Dr Paul Carr (Cardiff School of Creative and Cultural Industries, University of Glamorgan) with a generic purpose of investigating a range of pertinent themes that resonate within the live music industry in Wales.

1.2 The work has been supported by regular discussions of ongoing progress with a steering group comprising of John Rostron (SWN Festival), Lisa Matthews (WMF), Hefin Jones (WMF) and Deian Ap Rhisiart.

1.3 Pertinent themes outlined for analysis included: inward investment, training provision needs, examples of best practice, sales and marketing issues, and the Welsh language sector.

1.4 Stage one of the research methodology employed the implementation of an online questionnaire targeted toward the Welsh music industry.

1.5 This was closely followed by a range of face to face interviews with key industry personnel, who were given the opportunity to elaborate on and introduce specific factors that were relevant to the Welsh music industry.

1.6 The preliminary findings of points 1.2 and 1.3 above were then taken into four forum meetings in locations across Wales - Cardiff, Swansea, Caernarfon and Aberystwyth - where the industry at large was given the opportunity to discuss many issues in depth. These forums followed an initial open panel discussion in Newport to launch the research

1.7 All of the above was contextualised with a number of selected key texts that are documented throughout the text and in the bibliography.

1.8 Early draft copies of this research were also presented at *The Business of Live Music* conference, at the University of Edinburgh, between March 30th and April 2nd 2011, an event that was part of a larger *Arts Humanities and Research Council* research initiative led by professors Simon Frith (University of Edinburgh) and Martin Cloonan (Glasgow University).[22]

[22] See http://www.gla.ac.uk/departments/livemusicproject/

Swot Analysis

As a means of summarising the current position of the Welsh live music industry, a SWOT Analysis of the report can be outlined as follows

Strengths

- Wales has successfully produced many internationally acclaimed artists over a number of decades.
- The country already has a small number of excellent venues in various parts of the country.
- There are already a range of good infrastructural and business support mechanisms in place.
- Many Welsh artists have a strong national identity which assist the publicity of the nation to the world.

Weaknesses

- Wales as a whole has a limited array of specialist music venues, in particular outside of the South.
- There is a perceived lack of infrastructure to assist the promotion of popular music activity throughout the country.
- As outlined in by Owen and Rhisiart (2010), areas surrounding the exploitation and retention of copyrighted works within Wales is problematic.
- There is a tendency for too many skilled workers being ‘imported’ from England.
- Unlike many other small nations, there has been no fully funded mapping exercise of the Welsh music industry.

- Support for popular music from the *Arts Council of Wales* has room for improvement.
- Wales tends to be regarded as a ‘region’ of the UK as opposed to a nation in its own right.

Opportunities

- The development of similar Music Festivals to *SWN*, *Green Man* and *Wakestock* by working with organisations such as Welsh Assembly Government’s new *Major Events Unit* and the Arts Council of Wales’s new Festival Fund.
- The new *Cerdd Cymru* (Music Wales) partnership is a chance to align partners, in addition to consolidating many of the recommendations in this report, especially with international projects.
- The construction of an organisation similar to *DF Concerts* in Scotland (with WAG support) to ensure industry skills are nurtured, finance stays in Wales, and career aspirations are realised.
- To ensure that more people take on the challenge of live music promotion.
- For government to encourage more research and post graduate study into the Welsh music industry.
- To explore the means through which it is possible to empower musicians and live music enterprises to take advantage of the ‘micro loans’ outlined in the *Hargreaves Report* (2010) recommendations.
- To develop a (potentially accredited) music promotion programme that teaches the necessary skill bases to promote music throughout Wales.

- To explore the ways in which technologies such as *Wolfgangs Vault* and promotional tools such as *Songkick*, *Band Metrics*, *Music Glue* and *My Band* can be used to monetize live music within Wales.

- To develop alternative funding models for promoting music in Wales, such as the profit share scheme being developed by *The Absurd Festival.*

- To nurture future live music audiences by encouraging alcohol free venues for young people.

- There is a large media base in Wales, and if more welsh music was used, has the potential to positively impact the live sector.

Threats

- Various parts of Wales suffer from close proximity to English towns such as Bristol, London and Liverpool.
- Many participants in the Welsh industry give the impression that they reach a plateau in their career, after which they either change career or move out of Wales.
- The variance in local council infrastructures that encourage ‘night time economies’.
- The practice of buying in technical skills for some music festivals.
- The shortfall in technical skills forecast by *Creative and Cultural Skills* (CCS).
- Depending on the local council and size of the band –the *2003 Licensing Act*.
- Too much competition in small venues in Cardiff.
- Poor transport infrastructure in some parts of Wales.

Recommendations

The following recommendations are subdivided into sections directly related to the initial themes of the research. It is important to point out that some of the recommendations are applicable to more than one category, but are placed where it was considered they would have the most impact. As initially indicated in point 2.10, the viability of successfully addressing many of these recommendations in a sensible time frame is partially dependent on the capacity of the *Welsh Music Foundation* being able to dedicate at least a part time role to the post of 'Live Music Officer'.

Working Together

2.1 For WMF to continue their dialogue with *Cardiff Council* regarding the development of an information pack to assist the live music industry's constructive dialogue with the council. This should be developed with a view to dissemination in other regions of Wales.

2.2 As an additional means of kite marking standards, for *Creative and Cultural Skills* to work with WMF and the academic community to clarify and publisise the routes through which relevant training such as *Creative Apprenticeships*, *Foundation Degrees* and internships can be undertaken.

2.3 In conjunction with local councils, *Community Music Wales*, and the *Welsh Assembly Government*, for WMF to develop an action plan and associated funding that assists under 18's attend live music events in Wales.

2.4 For WMF to work with live music venues and promoters and partner organisations including *Visit Wales* to develop a one stop bilingual micro site that explicitly links to the promotion of live music. Further opportunities could be gained from wider reaching cultural tourism projects with *Wales Arts International*.

2.5 For WMF to work with *Creative and Cultural Skills*, the university sector, and festivals/venues in order to address issues associated with both the shortfall and importation of skills in Wales.

2.6 For WMF to work with the live music industry to develop and test selected alternative ways that venues, promoters and artists can work together to develop musical business models that impact the live music industry. Particular emphasis should be placed on audience funded models such as those being pioneered by *My Major Company*.[23]

2.7 To explore the viability of (re)developing a university based gigging circuit.

2.8 To explore the viability of facilitating more local council supported popular music venues.

2.9 For WMF to formulate a 'Music Industry Skills and Research Group' that aims to gather key stakeholders in order to prioritise and systematically address important issues raised in this report.

[23] http://www.mymajorcompany.co.uk/

Inward Investment

2.10 For the *Welsh Assembly Government* to provide the necessary funding for WMF to employ a ‘live music officer’ to co-ordinate the recommendations and comments within this report. It should be the officer’s responsibility to explicitly focus on increasing Wales’ current 4% share of the UK’s live music income. Although this role would preferably be full time, a part time role would be sufficient in the first instance.

2.11 In congruence with local councils such as *Leicester City Council*, for *Cardiff Council* to investigate the viability of employing a specialist music officer[24] to provide strategic expertise and advice to the various components of the live music industry, in addition to external bodies such as the tourist industry. If logistically viable, this post would work as a job share with the ‘live music officer’ outlined in 2.10.

2.12 For local councils to investigate ways in which it can assist the live music industry by considering initiatives such as reduced postering costs for local promoters, informed leniency regarding noise abatement notices, sponsoring of artistic talent, url links from council websites to assist promotion, and subsidised venue hire.

2.13 For WMF to meet with the *Arts Council of Wales* and *Creu Cymru* to discuss a method through which a selection of funded Welsh theatres can be subsidised to make them ‘multipurpose’ music venues both philosophically and physically.

2.14 For WMF to work with the *Arts Council Of Wales* to ensure its post Hargreaves objectives are actioned.

2.15 For WMF to work with the *Welsh Assembly Government* and the *Arts Council Of Wales* to discuss the viability of securing a ring fenced sum of money that can be

[24] This post could be part time in the first instance, and potentially part funded by WAG. At the time of writing the council’s current employment of a Film Officer offers an interesting precedent.

targeted toward export ready artists to support their international activities at major music festivals. This should build upon the fabulous work already being done by *Cerdd Cymru* (Music Wales),[25] whose recent bid to stage *Womex* in Cardiff was an excellent example of how creative and governmental bodies can work together.

2.16 With this in mind, the provision of information on Welsh music (including live) outside Wales needs to be consolidated, possibly under the *Cerdd Cymru* banner. As well as the tourist-facing measures outlined in 2.4, there is also a need for 'business to business' professional information. This may be something similar to *Events Scotland*[26] or part of a more comprehensive music information centre,[27] such as the much applauded *Finnish Music Information Centre*.[28]

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[25] Cerdd Cymru is a partnership between the *Welsh Music Foundation* and the international arm of the Arts Council of Wales (Wales Arts International). It was launched at Womex 2010, and has three principle objectives. Namely 1) to accelerate the export ready music sector of Wales, 2) To promote music from Wales internationally, 3) To bring the world stage to Wales.

[26] www.eventscotland.org

[27] Currently charged to www.tycerdd.org in Wales.

[28] www.fimic.fi.

Training Provision Needs

2.17 For WMF to formulate an annual training event focusing on how governmental decisions impact live music. This event, could be included as part of the current series of events WMF organise, and should aim to empower and co-ordinate the music industry within Wales to take advantage of specific opportunities, such as those inherent within the Welsh Assembly Government's *Major Events Strategy*, the *Arts Council for Wales* and *Hargreaves Report*.

2.18 In order to encourage more people to promote, for WMF to coordinate, develop and implement a promoters training programme and toolkit that progressively examines all areas of the profession (including musicians 'self promoting'). This would be co-ordinated by the 'live music officer' outlined above, and would build upon the work WMF have already developed with *Mentrau Laith* in the Welsh language sector.

2.19 For WMF to develop a pan Wales scheme for Kite Marking venues and good practice within the live music industry. This recommendation should be co-ordinated by the 'live music officer', with criteria developed in conjunction with CCS, *UK Music* and local councils.

2.20 For local councils to consider offering training sessions to the live music industry in subject areas such as the *2003 Licensing Act* and event formation.

2.21 For *Creative and Cultural Skills* to continue working with WMF and the college/university sector to ensure both *Foundation Degrees* and *Creative Apprenticeships* are what the industry requires, are readily available, and understood by the music industry.

Sales and Marketing Issues

2.22 To commission a feasibility study into the development of an event that has the potential to attract inward investment and publicity for Welsh artists. The event could be modelled on the interrelationship of *Showcase Scotland* to *Celtic Connections*, with the potential of being linked to an annual festival such as *SWN* (which already promotes a high percentage of Welsh talent). Unlike *Celtic Connections* the event should deal with all types of music.

2.23 This initiative should be a development of the *Cerdd Cymru* (Music Wales) partnership outlined above, and should be used as a catalyst to instigate and train more Welsh based agents and venues to work with Welsh artists.

2.24 Also see research issues at 7.10 and 7.12 below.

Examples of Good Practice

2.25 For WMF to work with local councils and appropriate funding bodies to develop more funded rehearsal room/recording studio facilities in Wales like those in Wrexham and Stockton on Tees [29] where there is a lack of commercial facilities.

Welsh Language Sector

2.26 It is essential that the recommendations in this report explicitly resonate with the Welsh language music sector (which in parts of the country make up the majority of

[29] Although care must be taken not to compete with the commercial sector.

the local live scene) and should therefore be carefully considered when actioned, in addition to being made available through the medium of welsh. The recommendations below are therefore in addition to those congruent to the entire music industry of Wales.

2.27 In coherence with recommendation 2.24, to initiate more subsidised rehearsal facilities outside the Cardiff periphery, as often the parts of Wales without such resources are the areas most likely to produce welsh language medium acts.

2.28 To investigate a scheme that is a development of the *Nights Out* scheme, that not only focuses on facilitating performances in areas of low music consumption, in non traditional venues, but also more explicitly popular music related performances that encourage and reward individuals promoting financially sustainable events.

2.29 In order to further assist the promotion of Welsh language music, the *Radio Cymru* C2 Schools Tour should be discussed with the *Welsh Language Board*, *C2 Radio Cymru* and the *Welsh Music Foundation*.

2.30 Also see research suggestion at 8.17 below.

Additional Research

2.31 A number of research initiatives should ideally assist the main recommendations outlined above. Rather than outline specifics at this point, the main themes are outlined at the following locations of this report: 4.15 – 4.18, 4.28 – 4.29, 7.12, 7.15, 8.6.

Analysis of Online Questionnaire, Interviews and Forum Meetings

3.1 A total of 129 people[30] completed the online questionnaires,[31] and it was gratifying to see responses from all areas of our intended target group, with the majority of responses describing themselves as artists (48%), followed closely by promoters (39%)[32] and live music venues (25%). It is important to note that on several occasions, some individuals describe themselves with multiple occupations, a factor that was expected considering the portfolio careers undertaken within the music industry.

3.2 Interestingly there were also a number of responses from industry practitioners such as Backline Technicians, Roadies, Brand Developers/Mentors, Record Labels, Producers, Record Labels, Stage Lighting, and Retail.

3.3 It was also useful to note the varied spread of ages and experiences feeding into the data.

3.4 The vast majority of questionnaire responses were based in South Wales (67%), followed by North (20%), Mid (7%) and West (4%). Although population statistics does verify these figures to some extent, the overwhelming dominance of South Wales may allude to a number of potential issues such as willingness to participate in *Welsh Music Foundation* mailing lists. Although the balance between being principally grass roots, but a publically funded organisation is a difficult negotiation process, it is suggested that WMF build upon the numerous outreach activities they

[30] 118 English, and 11 Welsh language.

[31] Please refer to Appendix 2 for an overview of the questions.

[32] Although the sample is very small, over 50% of the Welsh language respondents described themselves as promoters.

already do during the course of a calendar year, to ensure as many stakeholders as possible can develop relations of trust. This outreach should not only consider regions of Wales, but also the vast variety of musical styles and genres within them, in an attempt to also include practitioners who may fall outside of the 'popular music' sector.

3.5 Although a number of participants provided contact information, the majority of the sample decided they did not want to be contacted for interview. This is directly related to a preference for anonymity.

3.6 The data which follows contextualises the information from the online questionnaires, alongside interviews with industry personnel, in addition to forum meetings in Caernarfon,[33] Cardiff,[34] Aberystwyth[35] and Swansea.[36] It is grouped into the 'generic themes' highlighted by the *Welsh Music Foundation* as being 'pertinent' to the sustainability of the live music industry in Wales.

[33] At *Galeri* on 7/10/10.

[34] At *Chapter* on 22/10/10

[35] At the *National Library of Wales* on 9/11/10.

[36] At The *Monkey Bar and Café* on 11/11/10.

Working Together

4.1 92% of the online samples believed they were already working ‘closely’ with colleagues in related professions of the music industry, with artists, live music venues and promoters being the most popular answers.

4.2 The reasons why individuals in the industry worked together ranged from the need to interrelate with promoters (national and international), artists, agents, sound/lighting engineers and venues to organise gigs, to liaisons with schools (for outreach work and teaching) and government bodies (for obtaining or sustaining funding).

4.3 The most common sub sector that responders believed they would like to work with was ‘government bodies (18%), followed by ‘marketing’ (12%) and ‘booking agents’ (12%).

4.4 This is congruent to information imparted in both interviews and forum meetings, as the need to liaise with government bodies (such as local councils and funding bodies) in particular has been a pervasive subject matter throughout the research.

4.5 However, it is suggested that the lack of ‘need’ for roles such as marketing and booking agents that were previously undertaken by others may also be indicative of the structural shift towards DIY that has occurred in the music industry. From speaking to musicians it appears that there is an increasing requirement for musicians to undertake these roles themselves in the current climate.

4.6 Encouragingly, 58% of the sample believed they were working closely with sub sectors outside of Wales, with 91% of the English Language and 67% of the Welsh Language remainder stating they would like to.

4.7 63% /75% of the English/Welsh Language venue samples believed a minimum standards scheme for live venues would increase networking opportunities, with ‘general professionalism’, being by far the most pervasive perceived attribute, followed by ‘equipment quality’, ‘public liability’ and ‘publicity/marking qualities.

4.8 As opposed to these quality standards just being applicable to venues, it was also suggested that musicians (and other stakeholders) should buy into the minimum standards concept.

4.9 This is something that could initially be addressed by a training scheme, possibly in association with the *Musicians Union*.

4.10 As outlined elsewhere in this report, the importance of constructive dialogue between local councils and the music industry is vital if Wales is to exploit the means of instigating creativity and entrepreneurship, in addition to exploiting the financial potentials of the live music industry.

4.11 WMF have already commenced a constructive dialogue with *Cardiff Council* with an aim to develop an information pack that precipitates the live music industry’s discussions with the council.

4.12 Taking into account the governmental imperative to develop appropriate *Creative Apprenticeships* and *Foundation degrees*, forum discussions and interviews revealed a lack of clarity regarding the means through which to obtain these qualifications. It is suggested that *Creative and Cultural Skills*, WMF and the academic community work together to investigate how this can be rectified.

4.13 Discussion with some local promoters revealed difficulties in promoting live music events for audiences under the age of 18. Although such events can be considered an essential means to build future audiences, they often by default have poor profit margins in bar takings. Many venues are therefore perceived to (understandably) have a lack of enthusiasm to facilitate their implementation. It seems that this offers an opportunity for financial support from either *The Arts Council of Wales*, or the *Welsh Assembly Government*.

4.14 There are minimal examples of the Welsh music industry working together with the academic community on joint research projects.

4.15 For example, although not all are conducted by university departments, it is apparent that a number of small nations have already conducted mapping exercises into their respective music industries. Examples include: Denmark (*Mapping the Danish Pop Music Industry*, date unconfirmed), Trinidad and Tobago (*The Music Industry in Trinidad and Tobago*, date unconfirmed), Senegal (*The Music Industry in Senegal: The Potential For Economic Development*, 2004), and Scotland (*Mapping The Music Industry In Scotland*, 2003).

4.16 Although these mapping exercises include research into the music industry as an entity as opposed to exclusively live music, they serve as useful example of how Wales could conduct research into live music.

4.17 Research of this type could be conducted by academics funded by a body such as the *Welsh Assembly Government*, or via funded PhD studentships.

4.18 It is apparent that there are a number of technologies specifically aimed at the live music market today.[37] Although many of these serve similar purposes, it seems logical to conduct a thorough review of how technology could assist the industry in Wales.

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[37] For example *Songkick* (http://www.songkick.com/),*Band Metrics* (http://www.bandmetrics.com/index.html), Gigmasters (http://www.gigmasters.com/), *Live Music Machine* (http://www.livemusicmachine.com/), *Gigmaven* (http://www.gigmaven.com/), *Gigwish* (http://my.gigwish.com/en/about.php), *Sonicbids* (http://www.sonicbids.com/), *G2FM* (http://g2.fm/), *Online Gigs* (http://onlinegigs.com/), *Gig Finder* (http://www.reverbnation.com/main/overview_artist?feature=gigfinder), *Split Gigs* (http://splitgigs.com/), *Gigs*

4.19 Considering the skills gap indentified by *Creative and Cultural Skills* and the depth of research required to inform the infrastructure of the Welsh industry, it would be useful to develop a 'Music Industry Skills and Research Group' that aims to prioritise and systematically address important issues raised in this report.

4.20 An overall focus of the group would be to encourage discussion between *Creative and Cultural Skills*, education providers, representatives from the music industry and government.

4.21 The importance of the need for venues to work together and not 'compete' (too much) emerged as themes in both interviews and the online questionnaire. Numerous individuals involved in this research regarded this practice as an important means of ensuring local markets are not saturated and that a varied mix of music is ensured.

4.22 A document published by *The Department of Canadian Heritage* entitled *Working In The Music Industry in The United Kingdom* (2004) outlines that only 4% of the UK's 1300 'performing arts' venues are located in Wales.[38] This fact (alongside essentialist stereotypes such as the relationship of Wales with 'rain') not only lacks appeal to perspective inward investors, but also presents issues regarding the opportunities for artistic activity throughout the country.

4.23 When examining the *Visit Wales* website,[39] it seems that music could have a greater web presence and consequently play a bigger part in encouraging Cultural Tourism.

Wiz (http://www.gigswiz.com/app/index), *Indi On The Move* (http://www.indieonthemove.com/), *Reverbnation* (http://www.reverbnation.com/), http://www.ticketfly.com/#, http://bandapp.com/.

[38] Once again Scotland has a greater share of the total, equating to 12% of the total, with even the remote Highlands and Islands having a recognised gigging circuit.

[39] http://www.visitwales.co.uk/

When compared to *Events Scotland* for example,[40] there is a noticeably greater emphasis on the importance of 'events', and within this section, specific musical events such as *MTV* in Glasgow and the *Mobo Awards* are immediately noticeable. From within these links it is possible to obtain detailed information about Scotland's music scene, in addition to more regional practices such as Glasgow's Urban scene.

4.24 When discussing the future of *The Absurd Festival*, the organisers touched upon an interesting alternative funding model that is also a current conversation area with the *Musicians Union*. It compromises of the following factors. a: The festival has free use of the host venue (*Theatre Clwyd*) throughout the duration of the festival. This offers the venue an opportunity to develop its demographic and introduce new art forms and musical genres. b: Alongside the festival organisers, all artists are offered a 'profit share' scheme as opposed to the usual fee. Although this could be regarded as a greater risk for artists, it does help assure the event takes place, in addition to providing an incentive to ensure performances are well attended.

4.25 Discussions with the *Musicians Union* reveal the need for a metaphorical 'middle person' for the live music industry which could be responsible negotiating how stakeholders such as musicians, venues, promoters and managers can work together in a scenario such as this. This was considered particularly important during the current recession when so many artists are competing for the same work. It is proposed that this could be one of the many roles undertaken by the WMF Music officer recommended above.

[40] http://www.eventscotland.org/

4.26 Discussions with local promoters in North Wales revealed the need to change the culture of venues, who are sometimes perceived as requiring payment by promoters, even when bar takings can be substantive as a result of live music taking place.

4.27 The practice outlined above (with the venue offering free space) is seen by some as having the potential to make a significant difference to many promoters.[41]

4.28 It is apparent that alternative business models similar to this are beginning to emerge in the UK, with organisations such as *Slice The Pie*, [42] *Sell A Band*, [43] and *Pledge Music*[44] offering audiences the opportunity to invest in new talent via a profit share scheme. At the time of writing this report *My Major Company* [45] was launching an extension of this model in the UK, and as opposed to offering these opportunities to potentially any band, they intend to operate more like a traditional record company – offering a select number of bands funding opportunities via its web site in addition to having a proactive role in the artists development.

4.29 Although no band or venue have generated a significant financial return from these models as of yet, they offer an opportunity for further development.

[41] Indeed one promoter suggested that in some instances venues should consider paying artists and promoters to perform.

[42] http://www.slicethepie.com/

[43] https://www.sellaband.com/

[44] http://www.pledgemusic.com/

[45] http://www.mymajorcompany.co.uk/

Inward Investment

5.1 When asked how local councils could assist with the promotion of live music in Wales, the online questionnaire highlighted ‘allocated space for posters’ and ‘access to funding for venue improvement and training’ as the two dominant responses.

5.2 This is something that was verified in interviews, with one local promoter highlighting that (he believed) it was more difficult to poster in Cardiff, than Swansea or Bristol.

5.3 A cost effective ‘one stop’ production to postering service is available in Cardiff, and represents a model suitable for other cities in Wales. Organised by *City Centre Posters*,[46] (and also available in Edinburgh, Glasgow and Sheffield), the company works in conjunction with local councils, and offers a 50% discounted scheme on media costs for small and medium sized businesses who have been trading for at least 12 months.

5.4 The questionnaire also highlighted a potential lack of understanding between the music industry and (some) local councils, with the closure of private events such as *The Blowout Festival* and venues such as *The Point* cited as examples where constructive discussion may have rectified closures.

5.5 This was complemented with suggestions such as the potential development of more council supported venues,[47] more leniency with noise abatement notices, the potential sponsoring of artistic talent, url links from council websites to assist promotion, and subsidised venue hire.

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[46] http://www.citycentreposters.co.uk/

[47] Like the *Norwegian Church* in Cardiff for example.

5.6 It was also suggested that the impact of the recession had the potential to negatively impact the ability of councils to engage with the promotion of live music, consequently placing more importance on other stakeholders working together as outlined above.

5.7 The recent issues with soundproofing at *The Globe* in Cardiff is an excellent example of how regular audiences and other stakeholders can respond via fund raising gigs and online campaigns to find monies for works such as this. In the case of T*he Globe*, £26,000 was raised to ensure the venue stays open.

5.8 It was suggested that the construction of an 'organisation' similar to *Scotland's DF Concerts, Regular Music,* or *CPL Entertainment Group* (Cathouse) would represent an important contribution the government could make.

5.9 If an organisation such as this was developed, it would potentially have the impact of keeping more money and IP within Wales, with the nation effectively getting a greater percentage of the profits of performances, in particular with larger venues.

5.10 This would therefore assist the issues outlined earlier, by helping Wales increase its share of the UK live music industry from 4%.

5.11 Such a body would also prevent the exportation of key skills from Wales to England. For example some local promoters have indicated 'reaching a plateau' in their career, with the only solution being to move to London to carry on their trade.[48]

5.12 Although the organisational structure may be different, an equivalent of a 'DF Concerts' in Wales would ensure that there is a means of ensuring important skills and contacts are maintained within Wales' borders, in addition to assisting the career aspirations of those considering leaving the country.

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[48] It is common practice for successful local promoters to be headhunted.

5.13 In order to ensure local promoters do not feel isolated by the idea of a national Welsh promotional body, it would possibly need to comprise of promoters/members that meet a specific set of criteria such the number of years trading, regional reputation (via references), size of company, etc.

5.14 When asked if more venues would stimulate or threaten the market, the vast majority of responses (83.1%) indicated that there was a need for more venues.

5.15 Although this opinion is obviously dependant on location, popular reasons included the development of a greater variety of musical styles, a range of venue sizes to enable more acts to play in (south) Wales, more venues for artists to perform in (more employment), healthy competition, and the creation of a live music culture.

5.16 The type and quality of venue was also strongly highlighted, with many participants verifying the importance of developing a 'venue with a stage' in mid Wales.

5.17 Some responses also suggested how mid and larger venues have the potential to stimulate the market, with pub level activity seen to be already be saturated.

5.18 Larger venue types would also partially assist the issue of many touring acts bypassing Wales when undertaking UK tours, in addition to offering support act opportunities for local bands.

5.19 Although it is understood that questionnaire responses are from throughout Wales, and do not necessarily resonate on a local level, they provide useful commencement points for constructive discussion and potential inward investment.[49]

5.20 It is apparent that a forum for live music development would not only assist research around this discussion, but also enable some areas of Wales to learn from the good practice of others.

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[49] For example there is space for a Welsh based venue related to *The Academy Group*.

5.21 A recent publication by *The Arts Council of Wales* (2010) highlights the importance of developing a 'dynamic network' of performing arts venues throughout the country. It is suggested that this offers an opportunity to address some of the venue issues discussed elsewhere in this report either directly (via subsidising a dedicated popular music venue in mid Wales for example), or indirectly by making theatres 'multipurpose' at the planning stage, enabling the venue to professionally accommodate a wide range of music's, both philosophically and physically.

5.22 Despite the shortage of venues, it is apparent that the theatres outlined as part of the Arts Council ''core network' alone has the potential to partially address the need for a popular music touring network, in addition to providing performing space for emerging local artists. Performance opportunities may also emerge as part of *Creu Cymru* (Creative Wales),[50] an organisation that aims to develop 'theatrical' touring networks in Wales, acting as liaison between performance venues and artists.

5.23 There is however much more consideration required before a touring network can be implemented.

5.24 As opposed to reinventing the wheel, it is suggested that careful consideration is given to the touring network implemented by *Community Music Wales* over a decade ago. Originally a private venture in conjunction with regional local authorities, the initiative evolved to attract substantial *European Social Fund* finance and *New Deal For Musician* monies.

5.25 The initiative was largely focused on subsidising local bands to play in venues throughout Wales, essentially assisting both parties to build audiences. The programme also offered training for emerging artists and venues, with the ultimate aim of enabling them to become self financing.

[50] http://www.creucymru.com/index.html

5.26 It also included a Cardiff based music festival entitled *Compass Point*, which featured bands such as *Funeral For a Friend* and *Biffy Clyro* alongside emerging acts.

5.27 As part of *Complete Control* Music, the initiative also enabled artists to develop and record their music, prior to promoting their 'product' via gigs.

5.28 When questioning one of the organisers of the initiative, it was suggested the tension between the perspectives of popular music being subsidised, or simply being a product of market forces was a problematic grey area for many stakeholders to negotiate at the time, and it appears that this is something that is still an issue today.

5.29 It was also considered that financial subsidy is an important factor to assist any potential touring network, as factors mentioned elsewhere in this report such as slow ticket sales and poor transport are simply paradigms of the Welsh live music industry that are realistically 'impossible' to negotiate.

5.30 This leads to the issue of whether live popular music initiatives are considered a business initiative with an associated economic impact, or an art form that requires long terms subsidy such as Opera and Classical Music.

5.31 This business/art tension also raises the issue of if finance was raised to support a touring network – who would hold the money? It seems that fundamental issues such those outlined in point 5.30 needs to be negotiated, prior to further funding being considered.

5.32 As one of the key issues raised in discussions with some stakeholders was the dangers of subsidising a 'false economy', it is essential that funding is strategically targeted, with realistic, identifiable and accountable outputs. It is suggested that has to be taken into account when considering the subsidisation of any touring network.

5.33 The Performing Rights Society's *British Music Abroad* [51] currently receives funding from *Wales Arts International*, and Welsh artists can apply. However, this finance is not strategic, not open to enterprises, and most importantly, not controlled from within Wales. Taking this into account, it would seem prudent for the Welsh Music Industry to have a strategic ring fenced pot of money similar to that offered by *Creative Scotland*.[52] This fund would facilitate strategic decisions, and offer export ready Welsh artists and enterprises (who have already been offered to perform at events such as *Midem*, *South By Southwest*, and *Womex*) opportunities to increase their international profile.

5.34 Although the Arts Council is not providing any direct funding for popular music creativity at the time of writing, it's 2010 document does highlight three initiatives for further consideration: a) a re-drawing of the Welsh Assembly Government's IP fund to provide smaller or seed investment funding; b) an examination of the case for well-judged public support for popular music events in Wales (For example *The Green Man Festival*); c) to conduct research into physical infrastructures to see if existing facilities should be enhanced or extended. [53] Discussions with the Arts Council reveal that the *Music Industry Development Fund* outlined in *Renewal and Transformation: building a stronger future for the arts in Wales* (2010) is due to commence toward the end of 2011, and this should prove an important support mechanism for the Welsh music industry.

5.35 It is suggested that point C is particularly important, offering potential opportunities for venue improvement and rehearsal room development.

[51] http://www.prsformusicfoundation.com/funding/britishmusicabroad.htm

[52] http://www.creativescotland.com/investment/types-of-investment

[53] As indicated below, all of these points are also key recommendations of the *Hargreaves Report*.

5.36 Considering the potential for festival development in Wales, the Welsh Assembly Government's *Major Events Strategy*[54] (Events Wales, 2010) seems to offer excellent investment opportunities not only for established events such as *Hay Festival* and *Wakestock*, but more importantly for emerging organisers.

5.37 Although accepting the importance of small events and festivals, the strategy clearly articulates the importance of building a portfolio of major events that have the potential to have a significant economic and socio-cultural impact.

5.38 When interviewed, the Head of Policy, Strategy and Finance at Major Events clearly outlined the unit's willingness to work with entrepreneurs who have the foresight to develop recurring 'Signature Events', that enhance the cultural identity of Wales.

5.39 As suggested in the list of recommendations, the means through which the music industry is empowered to do this should be included in future WMF training events.

5.40 As outlined in the review of the *Creative IP Fund* in 2007 by *Northern Alliance,* the fund was seen to be well ran with proven economic returns, but best suited to Drama and Film/TV rather than music. Indeed the Hargreaves Report (2010) described investments in music as 'nonexistent'.

5.41 A clear recommendation emerging out of the Hargreaves Report is that a transition between the current *Creative IP* Fund and a new *Creative Industries Fund* takes place, with the latter being broad enough to include all digital media – including music.

5.42 As advised by the *Welsh Music Foundation,* a well timed seed investment fund/ micro-loan scheme with associated business support is more appropriate for the music industry than larger grants, and this has become a key recommendation of the report.

[54] Inspired in 2002 by *Event Scotland* (http://www.eventscotland.org/).

5.43 The report suggests that the ‘seed grant’ would assist commercial music businesses develop an IP approach, in addition to supporting popular music events that have economic benefit to Wales.

5.44 Considering these factors, it seems prudent for WMF to monitor the impact of The Hargreaves Report on Wales’ live music industry.

5.45 If many of these initiatives are to be coordinated through WMF, it is apparent that monies are raised to pay for an additional staff member - a ‘live music officer’. This post would not only coordinate many of the recommendations of this report, but also monitor ways in which Wales can improve its current 4% share of the UK total of live music income.

5.46 In order to complement this post, and in congruence with local councils such as *Leicester City Council*, it seems logical for *Cardiff Council* to employ/redeploy a specialist music officer to provide strategic expertise and advice to the various components of the live music industry, in addition to working with external bodies such as the tourist industry.

5.47 Although it is accepted that the current financial climate will make a dedicated full time post difficult, one of the main issues deriving from the forum meetings from is simply having a council contact who is knowledgeable of relevant issues in the live music industry.

5.48 The most pervasive theme outlined in the Aberystwyth forum meeting was transport issues in mid Wales. It was suggested that many of the suggestions outlined in this report would be meaningless unless the means of getting to venues is rectified.

5.49 As an indicative example, one participant living near Aberystwyth outlined that it is easier to get to a gig in Birmingham than to get to and from some parts of Wales (including Cardiff), and this issue needs serious consideration in the comparative live music research outlined above.

Training Provision Needs

6.1 It was interesting to note all areas of the questionnaire's responses considered generic training 'useful' or 'fairly useful', with factors such as 'Staff Management', 'Managing Projects', 'Managing Budgets', 'Time Management', 'Demonstrating Skills', 'Coaching Others' and 'Presentation Skills' all having at least a 60% combined total (of 'useful' or 'fairly useful).

6.2 This was complemented with suggested areas for training: such as accounting, business skills, web design, general professionalism, information technology, and funding applications.

6.3 Regarding the skills practitioners believed were important to an organisations' success, communication was by far the most pervasive answer, with professionalism, time and people management, marketing, the ability to work with people, and quality of music representing a snapshot of other suggestions.

6.4 Overall, 71% of the responses indicated that they would be interested in training provision in the future, with the preference being for one off workshops that focus on specific areas of the live music industry.

6.5 45% of English language responses indicated that they would be prepared to travel 41 miles or over to attend training provision, although this was not congruent to the Welsh language survey, in which none of the responders where prepared to travel this distance. Although the sample is small, this may be indicative of the transport issues documented elsewhere in this report.

6.6 63% of the combined sample indicated interest in weekend residential programmes, with 33% verifying they would pay all of the costs of their training. 46% were prepared to pay part of the costs (if subsidised by the government), with the remainder (33%) expecting the provision to be totally free.

6.7 76% of the sample stated that they had previously attended training provision related to the music industry, with examples ranging from the completion of music related degree's to one off workshops on the music industry.

6.8 During interview, even some established promoters stated that training provision would assist their capacity to maintain a long standing living within the profession. Although 'how to promote' may not be high on the agenda for individuals such as this, areas such as web development, emerging business models, and the means of obtaining funding are indicative areas that could be explored.

6.9 Skills training were also considered important to a number of emerging promoters interviewed. This suggests that a two or three stage pedagogical approach may be appropriate to ensure all stakeholders are catered for.

6.10 All of the forum meetings featured musicians who were involved in self promotion. This is obviously a different dynamic than 'stand alone' promotion, and should therefore be addressed in any training provision developed.

6.11 It was also suggested that local councils could offer training events to a broad range of industry stakeholders such as musicians, promoters and venues. In addition to demystifying factors such as the *2003 Licensing Act* and potential assistance with event formation, sessions such as these would also facilitate better communication between local councils and the music industry.

6.12 Although only 29% indicated that they would be interested in accredited university training via a *Foundation Degree*, 75% confirmed an interest in gaining accreditation for the experience they already have, with 75% also indicating they would be interested in gaining credit for what they already do in the workplace. This indicates a large enough sample to investigate the means though which a variety of university based accreditation can be achieved.

6.13 As indicated elsewhere in this report, the low number or participants displaying interest in *Foundation Degrees* may indicate a lack of understanding regarding the nature and purpose of these qualifications. Informal discussions in forum meetings also indicate a lack of clarity regarding the means through which to undergo *Creative Apprenticeships*, with those that were known about perceived as being very difficult to obtain places on.

6.14 It is therefore apparent that work needs to done with *Creative and Cultural Skills* and the College/University sector to ensure the qualifications are what the industry requires, are readily available and most importantly – understood by the music industry. The importance of this is outlined in CCS's *Beyond Borders* document (2011).

6.15 Once this is established, both of these qualifications need to be imparted to the industry as an important means through which training and qualifications can be obtained.

6.16 When discussing training with the *Arts Council of Wales*, it was suggested that very few commercial music practitioners took advantage of their *Advanced Study Awards in Music*.[55] The award provides finance to assist post graduate study at a recognised institution of the student's choice, and offers an excellent opportunity for advanced training provision.

6.17 It appears that this is also the case for *Beyond Boarders* funding, with the initiative offering funded opportunities for popular music practitioners to work and learn from musicians from other styles and genres.

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[55] www.arts**wales**.org.uk/3561.file.dld The scheme did however attract some jazz practitioners.

Sales and Marketing Issues

7.1 This section of the questionnaire was designed specifically for venues and promoters. It revealed a majority (67%) selling advance tickets (to some degree) for their shows.

7.2 This was achieved via various means, including online mediums such as *Bigcartell*, *Wegottickets*, *Ticketmaster*, *Seetickets*, *Ticketline*, *Ticketweb*, *Fatsoma*, *Catapult*, *Live Nation*, direct mail, social network sites such as *Facebook* and *Twitter*.

7.3 This technological approach was complemented to a lesser extent with the use of 'in house' box offices, local record stores, personal/word of mouth selling and local magazines.

7.4 Regarding marketing, the majority of responses (42%), highlighted a time frame of between 5 weeks and 2 months, with 26% preferring a shorter time scale of between 1 and 4 weeks, and the remainder going for 2 months and over.

7.5 As can be seen in the questionnaires (question 26) and the information highlighted above, venues and promoters use a wide variety of advertising techniques to market events, with *Facebook*, postering, local press, *My Space* and personal mailing lists being the most popular choices of those suggested.

7.6 This was complemented by avenues such as banners, personal websites and *You Tube*. When asked directly what the most popular form of marketing was, social networking was the most pervasive response, although a more 'grass roots' approach was suggested for certain types of events.

7.7 Surprisingly, only 48% of responses highlighted that they had a means of evaluating the marketing techniques they employed, and this is an area where targeted and relevant training could assist.

7.8 Those that did evaluate their events employed a range of techniques, ranging from the size of the audience, to informal approaches such as recognising faces on *Facebook*, to tracking opened emails, to questionnaires and surveys, to consumer feedback.

7.9 The question regarding the regularity of venues providing ticket counts was inconclusive, with a 52% - 48% split in favour of a positive response. Once again this may offer an opportunity of improving venue/promoter relationships if this can become part of a minimum standard scheme.

7.10 The relative higher earning potential of Scotland outlined above is an interesting comparison, and although further research is required, reasons for Wales' shortfall may be related to issues such as the lack of major national promoters such as *DF Concerts* or the infrastructural presence of more record labels such as *Sain*.

7.11 Wales' proximity to major English cities such as Bristol, Liverpool and London may also be a reason for issues related to the retention of IP within the nation, as it is relatively easy to find work outside of the country.

7.12 Slow ticket sales has been an issue in Wales for many years. Although further research is required to understand this fully, suggestions discussed in interviews included the additional cost associated with online ticket sales encouraging people to purchase at the venue on the night.

7.13 The development of a 'Welsh Ticket Master' was suggested by one promoter, or at the very least the considered exploration of an alternative/more cost effective means of selling tickets online.

7.14 The Business model currently being employed by *Los Campesinos* is an interesting example of what can be achieved. By subscribing to their quarterly magazine *Heat*

Rash,[56] fans receive a range of privileges such as free audio files (not released elsewhere), updates to the band's creative activities, pre releases of CD's, and no booking fees for concerts.

7.15 The perception of slow ticket sales was also seen as having the potential as being a contributory factor towards some artists not performing in Wales. Although the reasons for this trend are complex, the tendency and need for agents to sell in fast-selling territories (resulting in them being able to advertise the tour as 'Sold Out') is likely. The selling out of specific tours also means less work for the agent, in addition to better agent – artist relations.

7.16 It was also suggested that Cardiff in particular may have an over abundance of venues of around the 200 capacity, a factor that was contrasted with nearby Bristol, which has venues of various shapes and capacities.

7.17 Numerous interviews highlighted that Cardiff requires a .mid size, 500 capacity venue, in order to circumnavigate the jump between 200 to the larger venues. This would give promoters the opportunity to progress from the abundant 200 capacity venues to larger ones. The recent opening of the 2nd room in the *The Millennium Music Hall* (occurring after interviews took place) should theoretically negate this issue, but this will have to be analysed in post report discussions.

[56] http://www.loscampesinos.com/heatrash/

Welsh Language Sector

8.1 The live music scene in North Wales is principally based on a collective of pub venues which are not solely for the purpose of live music.

8.2 Having said this, some pubs do use live music as a substantial source of income. For example in addition to actual music venues in Gwynedd such as *Y Cell* and *Hendre Hall*, establishments such as *Railway Club Bangor* and *Ty Newydd Sarn* are very well suited to live music.

8.3 In the summer months, small festivals were seen to have come and go, with consistency difficult to maintain. For example: *Sesiwn Fawr* at Dolgellau was one of the main festivals on the calendar to showcase Welsh language talent, with styles ranging from folk to hip hop. Since 2008 this festival has been cancelled each year but is being revived in 2011 after a successful funding application to the *Arts Council of Wales*, with the emphasis on reverting to its traditional folk roots.

8.4 As with other parts of Wales, facilities can vary in quality, with some venues perceived as being more active in booking Welsh language acts than others. *Tafarn y Fic*, in Llithfaen near Pwllheli was presented as a good example of a venue that has interest in the Welsh music scene as an ethos, staging gigs on a regular basis and profiting from them.

8.5 Discussions with stakeholders in the industry revealed a difference of opinion regarding both the quantity and quality of Welsh language music, with one side believing the pool is very small and the other feeling it is ‘growing’.

8.6 The only way to verify this point would be to audit all bands that have reached a particular level of success (for example radio plays, tours, recordings etc), and calculate which incorporate the Welsh language. This data could be cross referenced against national trends.

8.7 As discussed later, The *Nights Out* initiative was generally considered irrelevant to some gig organisers in the live music sector in North Wales, mainly due to the lack of incentive for promoters to ensure events are financially sustainable. Some promoters also considered the scheme to bypass smaller promotional initiatives, an area where finance is arguably most required.[57]

8.8 As opposed to using funding to create new events, the general view with Welsh language promoters was the need to emphasise funding aimed at catalysing growth and sustainability of *existing* festivals. Having said this, it was considered important not to provide funding exclusively to large organisations, but smaller existing ones who are attempting to establish themselves.

8.9 The general opinion regarding the part *The Arts Council of Wales* plays in supporting Welsh language live popular music provision was in agreement with points made earlier in this report, with more direct input considered an important factor for the future growth of Welsh language live music.

8.10 It was also considered important that the *Welsh Assembly Government* should subsidise rehearsal facilities outside of the Cardiff periphery as a way of enhancing the quality of live music. As an indicative example it was stated that the Caernarfon/Bangor creative hub lack a low cost rehearsal facility. Based largely on anecdotal evidence, it is expected this is the case throughout Wales.

[57] According to the Arts Council of Wales' *Nights Out* officer, out of a total of 136 welsh language performances supported by the *Nights Out* scheme in 2009 – 2011, 36 were classified as popular music related 'gigs'.

8.11 The *PRS for Music* readjustment of the formula for composers and music publishers (that rely on *Radio Cymru* airplay) was deemed by some as having a negative knock on effect on the Welsh language live music industry. Composers that also perform on a regular basis have noticed a substantial drop in income, which has had an effect on the volume of activity in the live music in the last three years. [58] It has to be noted however that part of this decline can also be attributed to the current recession.

8.12 *The Academi*[59] was raised by some as an excellent example of good practice in terms of its support for writers, poets and rappers. It was therefore suggested that this scheme could be mirrored in the Welsh music sector for bands and artists.

8.13 It was also considered important to improve networking between venues, promoters, and artists in order to open up increased opportunities for musicians to work in Wales. For example, one promoter based on North Wales verified how many artists looked to English cities such as Manchester, London and Leeds to get work because there simply was not enough work within Wales.

8.14 As indicated by ap Siôn (2009, pp 64 - 67), it was suggested that a networking website may offer a partial solution to this problem for both English and Welsh speaking ensembles. This initiative could be part of the touring network discussion outlined elsewhere.

8.15 Inconsistency of audience numbers was considered a real issue with some promoters in North Wales. One promoter believed that audience preference for shows such as *The X Factor* and major arena tours to be a major concern throughout the grass roots sector of Wales.

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[58] For more information on this area, refer to ap Sion et al (2009).

[59] See http://www.academi.org/funding/i/130594/. The scheme is supported by *The Arts Council of Wales* and *The Welsh Assembly Government*.

8.16 Regarding data from the online questionnaire, the general opinion concerning the need for promoters to focus more on Welsh Language music displayed differences of opinion between the data collected in the English/Welsh Language questionnaires. In all a total of 19% of the English language survey believed more focus was required, compared to 81% of the Welsh Language. This discrepancy of obviously due to simple priorities of the respective sectors, and this is something that needs to be negotiated if the Welsh music industry is to move forward as a single entity.

8.17 Interestingly, the majority of the English language sample (46%) were 'unsure' of the need to focus more on Welsh language music, suggesting that further research and discussion is required before a conclusive result is possible.

8.18 Both Interviews and forum meetings suggested that the Welsh language sector in particular required entrepreneurs who were prepared to promote, but as outlined earlier the association of this scene with smaller pub gigs (and the consequent lack of money) may put interested parties off.

8.19 Overall, a combined total of 19% of responses believed the Welsh Language music scene was not in decline, although there was a lack of security in many of the responses, with high percentages throughout this section indicating they were 'unsure'. As indicated in 8.4 and 8.5, this reflects the need to gather precise data in order to calculate the pervasiveness of Welsh language popular music.

8.20 Regarding the impact of the recent PRS cuts, 83% of English language responses indicated this was not an issue or 'unsure'. This is in contrast to the Welsh language survey, in which 63% of responses highlighted this as a major issue. As with point

8.16 above, this difference of opinion is indicative of the individual priorities of the English/Welsh language sectors.[60]

8.21 As indicated earlier, the suggestion of a ‘one stop’ bilingual web site for live music in Wales received a positive response, having the possibility of bridging the gap between sites such as *Welsh Gigs*[61] and *Curiad*.[62]

8.22 There was a number of ‘themes’ that were highlighted as suggestions to improve some of these issues. This included the development of a communication line between Welsh language bands and English speaking fans, a greater awareness of the issues associated with the perception of some young Welsh speaking bands performing on national radio too early, and the potentials of funding English speaking Welsh bands to get their work translated into Welsh. [63]

8.23 It is apparent that even in strong Welsh language areas, most young people are often exposed to the same musical influences to those in other regions of the UK. Consequently, if parents don’t introduce young people to *S4C* or *Radio Cymru*, and if the *C2 Tour* does not visit their school, then some children’s exposure to Welsh language music is limited.

8.24 It was also noted that the C2 Tour currently tends to focus on DJ’s and musical workshops, as opposed to the previous practice of presenting more established artists into the school environment. This practice may consequently not be presenting the most appropriate impression of Welsh language music.

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[60] For example it could indicate that the majority of English Language respondents do not receive any significant PRS income, or that they are played mostly outside of Welsh language radio.

[61] http://www.welshgigs.com/

[62] http://curiad.org/

[63] Although in reality there would have to be a severe lack of new material for this to be a serious option.

Examples Of Good Practice

9.1 Most responders to the questionnaires (67%) agreed with the policy that venues and promoters should implement a practice of no ‘pay to play’. However, it is important that the opinions of the small percentage (15%) that consider ‘pay to play’ a viable practice is considered, in particular when developing a Kite Mark scheme.

9.2 Interviews with the industry revealed the potential risks of adopting a ‘no pay no play’ policy in an isolated way, as it opens the door for venues to be undercut by competitors. This protocol therefore requires acceptance not only from all venues, but from other stakeholders such as sound engineers, roadies, musicians, etc.

9.3 Interviews also revealed a tendency for some bands to accept more than one gig in the same vicinity within a narrow time frame, making it problematic for venues at the end of the sequence to make a profit.

9.4 If it is not possible to indoctrinate this into contract, it once again requires a ‘code of conduct’ that the industry buys into.

9.5 The majority of the sample believed that all venues should be PRS licensed (70%), should provide ear protectors (50%), have explicit contracts (70%), encourage professional conduct (79%), provide professional standard backline equipment (84%), monitor volume levels (69%), develop set wage structures (87%), and have clear policies on disability access (87%).

9.6 Regarding the monitoring of volume levels within individual premises, one venue suggested that the progressive annotation of volume levels throughout the evening was a useful practice from both a noise pollution and health and safety perspective.

9.7 The venue also recommended that providing ear plugs for staff and self employed sound engineers is an example of good practice that should be considered (although they generally don't like to use them). This is congruent to measures taken by *The Association of British Orchestras* and *The Musicians Benevolent Fund*, who implemented a series of training seminars in response to the formers *A Sound Ear* (2001) research findings.[64] It is suggested that a model such as this could also be incorporated for the popular music industry in Wales.

9.8 The development of a Kite Mark scheme ensuring standards such as these are encouraged was also met with general approval (63%) and the means through which this could be developed should be implemented via the WMF live music officer outlined earlier.

9.9 As an example of good practice, the *Musicians Union* is currently developing a Kite Mark scheme in conjunction with *British Underground*. Although the *Circuitlive* web site is still in development, it offers an insight into how something similar could be achieved within Wales.[65]

9.10 In order to ensure quality, it was suggested that venues should consider working with promoters, or even encouraging bands to promote themselves. With the latter in particular, it is apparent that regular training schemes will need to be implemented so practitioners have the confidence to consider this option.

9.11 As noted in the background to the development of the rehearsal rooms developed in Wrexham,[66] suitable rehearsal facilities are essential if emerging bands in particular

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[64] This was followed in 2008 by *A Sound Ear 2*. See http://www.abo.org.uk/user_files/ABO%20Publication%20Downloads/ASoundEarII.pdf

[65] See http://www.circuitlive.co.uk/?page_id=6 for details.

[66] Refer to http://www.soundnation.net/article.php?a=141

are to develop their skills. This concern was accentuated by the chairman of the 'Aber Live Music Society', who reiterated constant requests from musicians for affordable rehearsal space in Aberystwyth.

9.12 Like the Wrexham initiative, The *Green Dragon* rehearsal room/recording studio/venue venture in Stockton on Tees is an indicative example of how a local council can work with partners such as the *Regional Development Agency, The Northern Rock Foundation* and *Arts Council England* (North East), to provide a facility that provides subsidised space and tuition for the community.

9.13 The current *Welsh Music Foundation* printed directory has eight rehearsal studios listed for the entire nation. Although a few more receive an online listing, it seems prudent to suggest that further developments are considered in Wales. This is particularly relevant considering there has been 13 rehearsal rooms developed using the same formula as the Wrexham initiative, none of which are in Wales.

9.14 Recent grants from both *The Millennium Stadium Charitable Trust, Beacons For Public Engagement*[67] have enabled staff at Glamorgan University's *ATRiuM* campus to engage with local communities in South Wales, by offering free music lessons to young people between the ages of 11 – 16 in South Wales. The success of this programme and the attendance of the sold out performance at *Clwb Ifor Bach* has indicated that there is a big demand for a scheme that is funded on a more long term basis. [68]

9.15 As an indication of generic good practice, the 2004 poll commissioned by the Live Music Forum and conducted by *Market and Opinion Research International* (MORI) highlighted that 47% of venues are implementing live music at least once a year.

[67] See http://www.engagingwales.org/1158

[68] See http://cci.glam.ac.uk/music-academy/outreach/

9.16 It is however important to note that this is pan UK research, with figures seemingly exaggerated by Student Unions (91%), Clubs and Associations (70%), and Church Halls/Community Centres (68%), all of which could be argued to have much higher percentages than the average pub venue.

9.17 The MORI research also indicates that Wales has an average of 42% of its venues implementing live music,[69] a figure that is higher than London and the North East, but lower than the South East (58%), East Anglia (54%), and the South West (52%).

9.18 As indicated above, discussions with local promoters reveal an interest in training, providing it is delivered at an appropriate level. There are numerous existing models that offer the potential of development for the Welsh Music industry. They include

a) Making Music's *Young Promoter Scheme*[70] potentially serves as a model that can be adopted in Wales, enabling young promoters with the necessary firsthand experience and skills required to develop their business.

b) *Suffolk County Council* in conjunction with *Creative Arts East* offer a lottery funded handbook to emerging promoters entitled the *Home Grown Promoters Group Handbook*.[71] This publication offers a wide range of advice including budgeting, box office issues, front of house team, health and safety, and marketing and distribution.

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[69] It is important to note that many of the figures highlighted in the MORI report, where reduced three years later in the more extensive research carried out by BRMB. Interestingly, Wales represented one of the very few regions to increase live music provision, rising from the above mentioned 42% to 46% in 2007.

[70] The participants attend training workshops, and receive a subsidy per concert, generic marketing materials and mentoring.

[71] *Refer to* www.creativeartseast.co.uk/assets/hg%20handbook.doc

c) The *Arts Council of England* (North West) developed a *Young Promoters Scheme* based on the findings of a project initially ran in Lancashire in 1999. The project was awarded £38,100 to initiate a range a workshops that equipped young people to bring live theatre into their communities.[72] A full report of the projects findings can be found at www.takingpartinthearts.com/download.php?document=410

d) Merseyside *Youth Music Action Zone* (YMAZ) runs a workforce development scheme that aims to empower young people (aged 13 – 18) to generate their own music scene in their respective areas.[73]

e) Within Wales, *SONIG* (part of *Rhonnda Cynon Taf County Council*) runs a *Young Promoters Scheme*.

f) The *Arts Council of Wales* has extended its *Nights Out* scheme [74]to include a *Young Promoter Scheme* aimed at facilitating young people to bring live music into their communities.

9.19 As discussed above regarding the *Nights Out* scheme, discussions with some promoters revealed that due to the lack of financial risk on the part of the participants (promoter/venue/musicians) this scheme is not realistic or appropriate, suggesting a part funded method (perhaps where funding could be used to match fund profit) may be better. There was also a belief that the scheme was more suited to community group activity as opposed to popular music promotion.

9.20 The development of a pan Wales touring network has been the topic of much discussion during this research. As indicated in points 5.24 – 5.28 above, this

[72] Refer to http://www.takingpartinthearts.com/content.php?content=274

[73] Refer to http://www.youthmusic.org.uk/case_studies/MZONE_young_promoters.html

[74] Now in its 30th year. Refer to http://www.nightout.org.uk/

initiative has already been tested by *Community Music Wales* over a decade ago, and potentially provides much data regarding how/how not) to undertake such a project again.

9.21 Finally, in drawing comparisons with Welsh popular music, recent export successes in Finish popular music have resulted in what Janne Mäkelä describes as a "reconfiguration of the state music policy" (Mäkelä 2008, p.257), with the Finish government currently offering a range of subsidies to the music industry, ranging from the sponsoring of performers, assistance with recording costs, to video production and touring assistance. Although a long term objective, the formulation of a music policy that overtly supports popular music is something for all stakeholders to strive toward.

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Appendix 1: A Synopsis Of Issues Surrounding the 2003 Licensing Act

10.1 The 2003 Licensing Act became law on November 24 2005, with the intension of introducing a single licensing scheme for premises covering entertainment and alcohol sales. It was reported as representing the biggest reform in licensing law in 40 years.

10.2 Its objectives were broad, having four key themes: crime prevention and disorder, public safety, the prevention of public nuisance, and the protection of children from harm.

10.3 According to the Department of Culture Media and Sport, it's key features included flexible opening hours (to prevent excessive drinking), consideration of the impact of opening hours on local residents and businesses, a single licence to enable venues to run multiple events, and the right for local residents and businesses to make representations about applications.

10.4 The pairing of music licensing and the sale of alcohol has often received criticism from the music industry, who have contested the linking of live music with noise and excessive drinking.

10.5 Its overall intention of the act was to precipitate a more benign and 'flexible' drinking culture, while giving local people a say in licensing decisions.

10.6 Regarding the development of the live music sector, the act expressed the utopian intention of furthering the 'development within communities of our rich culture of live music, dancing and theatre, both in rural areas and in our towns and cities'. [75]

[75] Department for Culture, Media and Sport, *Guidance issued under section 182 of the Licensing Act 2003 and Guidance to Police Officers on the Operation of Closure Powers in Part 8 of the Licensing Act 2003*, July 2004, Foreword, p7.

10.7 Unlike its predecessor, it did not require a licence renewal process (providing there are no ongoing problems).[76]

10.8 In order to monitor this vision, the then labour government set up *The Live Music Forum* in 2004, headed up by Feargal Sharkey.

10.9 In conjunction with DCMS, the *Live Music Forum* commissioned MORI to conduct two pieces of research: *A Survey of Live Music in England and Wales* (2004), and *The Experience Of Smaller Establishments In Applying For Live Music Authorisation* (2006).

10.10 Before disbanding in 2007, The Live Music Forum's report (*The Live Music Forum: Findings and Recommendations* 2007) was published in July 2007, describing the impact of the act on the number of venues wanting to stage live music as 'broadly neutral' (p.10). This report also found some small gigs were harmed, and recommended exemptions for gigs with fewer than 100 people attending, and also for unamplified performance.

10.11 Head of the *Live Music Forum*, Feagal Sharkey was subsequently outspoken about the licensing act's negative impact on public performance at the time, as was reported in national outlets such as *The Stage*,[77] and the BBC.[78]

10.12 Although the Government did not agree with these findings, (publishing a counter argument in Department for Culture, Media and Sport, *Government's Response to the Live Music Forum's Report*, December 2007), the description of 'neutral' does

[76] Although a yearly fee is required.

[77] See http://www.thestage.co.uk/news/newsstory.php/17334/sharkey-calls-for-changes-to-ambiguous

[78] See http://news.bbc.co.uk/1/hi/entertainment/6268406.stm

comply with the earlier baseline study conducted by MORI (2004),[79] and the 2007 British Market Research Bureau (BMRB) report.[80]

10.13 The Live Music Forum's 2007 report highlighted a number of positive observations, namely: that the vast majority of local authorities had behaved responsibly, the act had not impacted any specific style or genre (p.30), and the emergence of new venues outnumbered those ceasing to provide live music (p.30).

10.14 In addition to noting that the act had not led to the promised increase in live music (p.30), the report also noted some other negatives, namely the nature of many of the public complaints about noise levels and crime and disorder are greatly exaggerated (p.36), the inherent bureaucracy of licensing sometimes prohibits venues and promoters to consider an event (p.52), and that some local authorities do adopt a 'heavy handed' approach to licensing.

10.15 The 2007 BMRB report outlined above concluded that although financial growth in live music may have occurred overall, live music provision had decreased by 5% in smaller secondary venues.[81]

10.16 The BMRB research also indicated that around 80% of premises licences that are granted have conditions. Additionally, these conditions depend on the type of venue. For example small clubs = sound restrictions, Church Halls and Community Centres = audience size.

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[79] Whose research indicated that 64% of venues who 'know a little about the licensing act' thought it would make no difference to their business. To some extent the 33% of the sample who thought it would have a positive impact is negated, due to the samples ignorance of the impact of the act.

[80] Which stated that 74% of venues believed the Licensing Act had no impact on their capacity to stage live performance.

[81] Venues that do not make their core income from live music.

10.17 Licence restrictions were also related to area, with the South West having 91% of the licences granted with some restriction, as opposed to 70% in the West Midlands.

10.18 Although it had been suggested by *The Live Music Forum* (2007) that the bureaucracy that smaller venues have to undertake in order to stage live music may be prohibitive, the BMRB research indicates that commercial considerations such as lack of customer demand and cost-efficiency are potentially more relevant.

10.19 Interestingly, customer demand is also cited as a major reason for putting on live music in the BMRB research, indicating that music is considered a good way of bringing in custom.

10.20 This commercial imperative that Secondary Venues have, may be one of the reasons why artists are often so poorly paid.

10.21 Very few venues are cited as staging live music for altruistic reasons, and this is something that resonates with many local promoters interviewed as part of this research.

10.22 This is exacerbated with the removal of the ‘2 in a bar rule’.[82] First introduced in 1961, the legislation has enabled venues of any size to bypass public licensing bureaucracy - providing performers totalled no more than two.

10.23 At the time of writing, Liberal Democrat Lord Clement Jones is also fronting a campaign that would enable a solo act <u>or</u> band to perform at any venue that has an alcohol licence between the hours of 8.00 am and midnight, as long as capacity is under 200.

10.24 He is also attempting to assist venues such as hospitals and schools to circumnavigate the bureaucracy associated with *Temporary Event Notices* (TEN), and act as temporary venues, providing they don’t sell alcohol.

[82] Which the government believed would provide more incentive to venues to use more than two musicians.

10.25 In May 2009 the all party Culture, Media and Sport Committee published the findings of its public inquiry into the impact of the licensing act.[83]

10.26 The report obtained evidence from, among others, local authorities, the police and representatives of the music industry, including Feargal Sharkey.[84]

10.27 The Committee concluded that the Act was harming small scale events, and recommended an exemption from entertainment licensing for venues up to 200 capacity, and a return of the exemption for two live performers.[85]

10.28 The negative impact of the Licensing Act 2003 in Wales was reported as recently as 4th March 2011 during the 2nd reading of Lord Clement-Jones' live music bill. In her maiden speech, Baroness Randerson, then a Member of the National Assembly for Wales, said:

> I come from what is popularly known as the land of song. However, the Licensing Act 2003 has made it considerably more difficult for that song to be heard by an audience. As Minister, I introduced a culture strategy, Creative Future, which emphasised the importance of music in the cohesion of communities and for our tourist industry and economy in general. We planned to increase opportunities for professional musicians, and to reinvigorate amateur and semi-professional community music organisations such as choirs and brass bands. We planned to strengthen the infrastructure of small venues for the performance of all types of music. However, the

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[83] See http://www.publications.parliament.uk/pa/cm200809/cmselect/cmcumeds/492/492.pdf

[84] Now in his capacity as CEO of *UK Music*, the umbrella lobbying agency for the music industry.

[85] Refer to chapter 5 - 'Live Music and Entertainment' (pp. 27-30).

Licensing Act 2003 proved a hindrance to those ambitions. Your Lordships will be well aware of the reputation of Welsh National Opera and the BBC National Orchestra of Wales. What your Lordships might not be aware of is that those renowned organisations also tour extensively in Wales, in small groups to small venues-to churches, village halls, schools and youth centres. They are funded by the Arts Council of Wales to do so to inspire our young people, provide community cohesion in deprived areas and provide entertainment in rural areas that get very little else by way of entertainment. The Arts Council of Wales has a very well established and highly respected scheme called Night Out, which helps to fund professional organisations in community buildings. However, these initiatives have had to work against the grain of the Licensing Act. The time, cost and bureaucracy involved in getting a licence for a small venue when you are likely to hold only two or three such events a year is simply not worth it. Remember, those venues are almost invariably run by volunteers, who have neither the time nor the expertise to go through that bureaucratic minefield. Geographically, Wales is 80 per cent rural and characterised by a network of village and church halls. The entertainment that they can host has been curtailed by the 2003 Act.[86]

10.29 When discussing the impact of the act with live music campaigner Hamish Birchall, the following methodological issues in the 2004 research conducted by MORI were raised. He stated;

[86] This section of the report is indebted to Hamish Birchall for providing accurate up to date information about the *2003 Licensing Act.*

- It did not discriminate between gigs that were open to the general public and private functions. That might not matter if the goal was simply to estimate a total number of gigs per year. It does matter if you want to assess the impact of the new licensing regime on gigs accessible to the general public. The new licensing regime had a much increased reach, capturing many previously exempt performances, and many hitherto private and exempt functions. This is makes it difficult if not impossible to assess the impact of the new regime on public gigs. Under the old regime, most private gigs were exempt.
- The survey intention was to focus exclusively on 'secondary' music venues, including particularly those where the 'two in a bar rule' applied. But DCMS later confirmed that some venues whose core business was live music were included. This would tend to skew gig figures upwards (by how much is difficult to estimate).
- The survey allowed DJs to count as 'live music'. This was confirmed by a member of the original DCMS Live Music Forum: '...DJ's would be classed as live performers because on occasions they are an integral part of a live music set and also the mixing/scratching 'creative' aspect of their music-making was recognised as such.'[87]

10.30 Hamish Birchall also believed the 2007 BMRB report as having methodological flaws. These included;

- 57% of interviewees knew little or nothing about the Licensing Act.

[87] Information provided from Hamish Birchall via email.

- Many interviewees were not working venues in 2005 during the transition to the new regime. They are therefore not reliable sources for the venue's live music provision at that time, or the then public entertainment licence permissions.
- Licensing in about 20% of licensed venues is handled centrally by company lawyers, not the licensee.
- Key interviewee responses on reasons for having/not having live music were not reported verbatim but 'paraphrased' BMRB/DCMS under headings of their own.

10.31 When asked about the impact of licensee attitudes to live music, Birchall commented;

> I would accept that, for many, licensing is not the immediate reason that they don't put on live music. Commercial and practical considerations are often likely to come first. But I do reject the DCMS claim, made vehemently at the time by their statistician that the 5% drop in live gigs found by this survey was not, at least in part, due to the new regime. 88

10.32 Regarding the 2009 DCMS research, which claimed the live music sector to be ‘thriving’, it is important to note that many believed the findings problematic. This was expressed in an open letter to the chair of the UK Statistics Authority (UKSA) in June 2010.89

[88] In correspondence with the author, April 2011.

[89] Refer to http://www.livemusicforum.co.uk/hbtouksaletter.htm

Appendix 2: Online Questionnaire

1. What area(s) of the live music industry do you or your company mainly work in?

2. How long have you been involved in the live music industry?

3. In what area(s) of Wales is your main business centred?

4. In your experience, has the introduction of the 2003 licensing Act had any impact on your business?

5. Do you work closely with other colleagues involved in the live music industry in Wales and beyond?

5.a. If you answered yes to the above, can you indicate below what areas you work with?

6. Can you briefly describe how and why you work together with others?

7. Please highlight any sub sectors below that you would like to work with, but have not been able to.

8. If you are a venue, some practitioners have said that they would only work with other venues if they were assured they had similar levels of professionalism.

Do you think a 'minimum standards' scheme would help increase networking?

9. What areas to you think the 'standards scheme' should cover?

10. Indicate in what ways you think your local council should assist the promotion of live music in Wales?

11. Do you think that more venues in your area would stimulate or threaten your market?

11.a. Can you provide a brief reason for the answer above?

12. Do you work regularly with any sectors of the live music industry (for example agencies) outside of Wales?

12.a. If you answered no to the above, would you like to work with other sub sectors?

13. How useful would training in the following 'general' skill areas be in assisting with your current role, or future career?

13.a. Staff / team management **13.b.** Writing reports **13.c.** Managing projects **13.d.** Managing budgets **13.e.** Managing your own time **13.f.** Teaching or Demonstrating skills **13.g.** Coaching others **13.h.** Making presentations to an audience

13.i. Please detail any other general (i.e non-specialist) training needs here

14. In your work, do you find it difficult to find skilled practitioners?

14.a. If you answered yes, what skill areas do you think training could address

15. Have you ever attending any training courses related to your work in the music industry?

15.a. If you answered yes to the above, what was the course?

16. Would you or your organisation be interested in attending education/training provision in the future?

16.a. If you answered 'yes' to the above, would you be interested in:

17. How far would you be prepared to travel?

18. Would you be prepared to pay if the training was appropriate?

19. Would you be interested in residential long weekend programmes?

20. Would you be interested in obtaining a qualification based on your previous experience?

21. Would you be interested in gaining credit for what you already do in the workplace?

22. What do you think are the most important skills for you/your organisation's success?

23. Do you sell advance tickets for your shows?

23.a. If so, can you briefly list which outlets or services you use?

24. How many weeks do you allow to market your show?

25. Do you use a designer for posters/flyers etc or do you do it yourself?

26. What sort of marketing do you use?

27. What types of marketing do you feel are the most effective?

28. Do you have any ways of evaluating your marketing?

28.a. If you answered yes, can you briefly describe how?

29. Do venues and ticket outlets provide you regular ticket counts?

30. Please document any further comments that you think would assist you ability to market gigs in your area.

31. Please tick the boxes below that you most agree with concerning your views on the Welsh Language scene.

31.a. Do you think there are a lack of promoters focusing on Welsh Language music at the moment?

31.b. Do you think there are a lack of new Welsh Language bands active in the scene at present?

31.c. Do you think the Welsh Language music scene is in decline?

31.d. Do you believe that the recent PRS cuts are having an impact on the Welsh Language live music scene?

31.e. Do you think that Welsh Language bands need to sing in English in order to make a living?

31.f. Do you think there is a need for a 'one stop' web site promoting live music in Wales?

31.g. Does Radio Cymru contribute significantly to the current Welsh Language live music scene?

32. Can you provide any advice/comments on what needs to be done to ensure the Welsh Language live music industry prospers?

33. Could you indicate if you consider the following as examples of good practice for venues that promote music on a regular basis?

33.a. Venues and promoters should have a policy of no 'pay to play'

33.b. All venues should be PRS licensed

33.c. All venues should provide ear plugs/sound defenders for staff and audience

33.d. Written documentation for artists concerning aspects such as hire fees, guest lists, standard of food, merchandising etc.

33.e. Policies ensuring professional conduct of staff.

33.f. Policies concerning the standard of equipment provided (ie PA systems).

33.g. Policies concerning the monitering of volume levels in venue.

33.h. Policies on payment to artists.

33.i. Policies on payment to sound technicians (for example - more bands = more money)

33.j. Policies on disability access.

33.k. The development of a Kite-Mark scheme that ensures agreed standards such as the above are in place.

34. Would you be prepared to partake in a short interview to discuss your views further?

34.a. If you answered 'yes', please provide your contact details (email address/phone

35. Would you like to provide any further feedback that has not been explored in the questions above?

36. Would you like to provide any feedback on the survey itself?