A photograph of a large outdoor music festival. In the foreground, the back of a person's head is visible, looking towards a stage. The stage is lit with various colored spotlights. A dense crowd of people is in the middle ground, and tall trees are silhouetted against a bright sky in the background.

**SOUND
DIPLOMACY**

SOUND DIPLOMACY MUSIC CITY REPORT INFORMING A MUSIC STRATEGY FOR CARDIFF

Music Ecosystem Study and Strategic Recommendations

Presented by Sound Diplomacy
to Cardiff Council

March 2019

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Cover Image courtesy Tafwyl Festival

1. INTRODUCTION

As both the capital of Wales and its largest city, Cardiff — a multilingual city in a bilingual nation — acts as a nerve centre for Welsh culture as well as domestic and international tourism. The city is the fastest-growing in the UK proportionately, so infrastructures must be put in place or updated in order to foster and support the growth of these sectors.

It can be easy to forget that 'culture' is not an industry, but rather a tapestry of different sectors and economies, each of which carries its own political and infrastructure needs. Cardiff is the first city in the UK to incorporate music urbanism into its city structure, from planning and licensing to social wellbeing and tourism. Music urbanism sees the value that music brings to a city and integrates it across all government departments, rather than reducing it to simply education or as a marketing tool for tourism.

In keeping with this, each department in the City Council must look at music and ask itself how it can best support the local music industry and how it can incorporate music within its own strategies in order to maximise its effects and improve the standard of living within the city. In order to be used effectively, music must be a primary consideration rather than an afterthought. Questions that help define and explore the value of music across each department are:

- **Governance and Leadership** – How strong are the lines of communication between the music industry and policy makers, if they exist at all? Is there a board, and, if so, are there a variety of sectors represented on it? Is there a dedicated council member for music or cultural industries?
- **Licensing & Police** – Consider if any improvements can be made to the approach to licensing to ensure all relevant parties involved and due regard had to cultural value as well as prioritising safety.
- **Spaces and Places** – Do musicians have accessible, affordable and adequate facilities to rehearse, record and perform in? Are there a variety of different capacity music venues? Is there diversity in genre and demographic representation?
- **Planning** – Are music and culture treated as a core priority, alongside other land uses, in regeneration policies? Are cultural and musical provisions being built into new schemes, or are they left to be added as an afterthought?

- **Transport** - Is transport policy taking into account the needs of artists and creative businesses? Is there a sufficient evening and night time economy transport policy that allows for the arts to be showcased and for those enjoying them to be able to travel home safely afterwards?
- **Education** - Is music education being treated with the same priorities as other subjects? Music education, at the earliest age, supports cognitive development, promotes socialisation and engages young minds in ways other subjects do not. Is there an understanding that a city's future business-people and citizens will benefit from musical engagement?
- **Employment & Skills** - How is the music industry involved in the development, growth and success of the city? Is it creating jobs, supporting artistic development and engaging citizens? Is there a policy to develop this?
- **Tourism & Branding** - Is music taken seriously as a potential tool to encourage tourism, support soft-power mechanisms and improve the desirability of the city? A thriving music and culture scene is often a priority to attracting investment, jobs and skills. Is there enough focus on this?

Each of these categories are represented in the key findings outlined below, which have been developed through the earlier regulatory assessment, a series of local roundtables with interviews and a survey issued to Cardiff's music industry professionals. The findings have formed the basis for the recommendations in this report, Cardiff's unique resource to make it a leader in music urbanism.

1.1 About the project

Cardiff is the fastest-growing city in the UK and looking to establish itself as a leader in the Music Cities movement, a standard of urban development which champions and promotes music as a tool for growth rather than a by-product of it.

Cardiff already has a thriving music ecosystem, an amalgamation of live music opportunities from local pubs to concert halls, stadium shows and everything in between. Music is woven into the city's identity and history, with a world class classical music offer and a springboard for Welsh bands to boost their careers. While this is still true today, the city's music industry would benefit from being aligned with wider city strategy surrounding broader economic and population growth. It is important to not only maintain lines of communication between policy makers and industry, but also to adopt a collaborative approach that ensures the city works to support and champion its musicians and music professionals.

This project analyses Cardiff's music ecosystem in its entirety in order to identify the most effective strategies for development. This research is divided into several sections — including economy, infrastructure, tourism, education and the built environment. It aims to establish what makes Cardiff the culturally robust city it is and to set out how to maximise its role as a Music City.

1.2 Methodology

This project began with a series of roundtables, interviews and an industry survey. These provide primary sources for statistics and the experiences and opinions of people working in or alongside the music industry. These findings are cross-referenced with research, which collates relevant newspaper articles and city policy, such as the Cardiff Local Development Plan, Supplementary Planning Guidance, Section 106 laws, and alcohol and noise regulations. The findings are then mirrored in a series of international comparisons with cities chosen for their similarity in size and structure to Cardiff. It is from these findings that our recommendations have been made.

The economic impact of Cardiff's music industry was measured using existing research by the UK Office for National Statistics (ONS) and PRS for Music as well as a survey conducted by Sound Diplomacy. Music industry subsectors were chosen using the UK Standard Classification of Economic Activities 2007 (SIC 2007). These official statistics formed the basis of any direct economic impact figures. Employment figures were determined using the Business Register and Employment Survey (NOMIS) 2016, while incomes were derived from the Annual Survey of Hours and Earning (ASHE) 2016. Indirect and induced economic

impacts were found through the input-output matrix and its multipliers, cross-referenced against statistics by the ONS and Cardiff University.

1.3 About the authors

Sound Diplomacy is the leading global advisor on Music Cities and market development. As strategists for cities, developers, large private sector organisations and governments, Sound Diplomacy provides cutting edge research and market expertise in increasing the value of the music business economy at a state, city and regional level through development plans. In addition, we are experts in music tech strategies, from trade missions to market development, research and consulting.

Sound Diplomacy works in both the public and private sectors, currently working in 20 different countries for a number of governments (local, regional and national), property developers, music and music-tech conferences, economic development agencies, arts councils, chambers of commerce, universities, export offices, festivals, brands and record labels.

2. CONTEXT

2.1 Global context

The UK has long been one of the largest music markets in the world, behind only the US, Japan and Germany in 2017.¹ Music contributed £4.4 billion in GVA to the UK and supported over 142,000 jobs in 2016,² showing overall industry growth across all fields since 2012. This includes a 5% growth in the music recording sector, its first growth in five years. The growth in recorded music revenues was led by streaming, which provides an incomparable opportunity to build audiences both in rural areas and abroad.

The UK's live music sector grew 14% in 2016, and its job market grew 13% during the same period.³ 30.9 million people attended live shows, 27 million of whom were at concerts and 3.8 million at festivals. The live sector made up a quarter of the total music industry GVA and 20% of the total employment force.⁴ Music tourism sustained 47,445 full time jobs, up 18% from the year before⁵. In 2017, Wales saw 379,000 music tourists spend £115 million (direct and indirect) on concerts and festivals.⁶ Although concerts received higher attendance figures, festival audiences spent more overall, bringing £39 million directly into the economy at popular events such as the Green Man Festival and Festival No. 6.

The effect of the 'Brexit' negotiations are still to be fully determined, although the live industry is expected to be one of the sectors most affected by leaving the European Union. This is particularly true for grassroots and smaller-level foreign artists embarking on their first UK tours, as the amount of bureaucracy involved at the border is expected to increase. However, it also presents the opportunity for UK artists to focus on new markets to export their music to.

2.2 Cardiff's place in the UK's music industry

Cardiff has long been the hub of the Welsh music industry, a launch pad from which many bands have gone on to achieve international success. Super Furry Animals, Catatonia, High

¹ IFPI (2018)

² UK Music (2017a)

³ Ibid.

⁴ Ibid.

⁵ Ibid.

⁶ UK Music (2017b)

Contrast, The Stereophonics and the Manic Street Preachers are among many who honed their craft in the city's venues.

With regards to Classical Music, Cardiff is one of the UK's leading cities, both in infrastructure and provision. There are two world class resident orchestras, the BBC National Orchestra of Wales and the Welsh National Opera Orchestra, and also the Cardiff Philharmonic and Sinfonia Cymru. In terms of infrastructure, The National Concert Hall of Wales (St David's Hall) is widely recognised as being one of the top ten concert halls in the world for acoustics, and Hoddinott Hall is both a concert hall and state-of the art recording studio, also with world class acoustics. Complimenting this offer is the Conservatoire at the Royal Welsh College of Music and Drama and the Doris Stoutzker concert hall.

Wales is known as 'the Land of Song' and has an international reputation for Choirs and Choral activity, and Cardiff is at the epicentre of it, with the BBC National Chorus of Wales, Cardiff Polyphonic Choir, Cantemus Cor Caerdydd and Cardiff Ardwyn Singers all based in the city. Cardiff also hosts the international competition BBC Cardiff Singer of the World and the Festival Of Voice.

Cardiff offers a range of venues from grassroots to stadium. Recent stadium tours include the likes of Beyonce & Jay-Z, The Rolling Stones, Ed Sheeran, Coldplay and Robbie Williams, while Florence + the Machine, Jason Derulo, and George Ezra have all played the Motorpoint Arena in the last year. However, the proximity to Bristol is a challenge, as many national and international acts play there instead of Cardiff.

There is a hive of music activity around Womanby Street, particularly focusing on the rock and indie genres, an area of contemporary music Cardiff specialises in. Womanby Street is a blend of bars and smaller venues including local favourite Clwb Ifor Bach. It is the kind of bustling alleyway that could only have developed organically over years. However, like many of its counterparts across the UK, it is continuously at risk from unsympathetic redevelopment and has already seen some of the city's favourite venues close their doors.

This trend is not unusual, nor is it unique to Cardiff. This report will establish the basis for ensuring that Cardiff's music scene is protected and its individuality is nurtured and championed for years to come.

3. CARDIFF'S MUSIC ECOSYSTEM

3.1 Cardiff's music economic impact

Cardiff is responsible for approximately 30% of the production and 41% of the jobs generated by the core of the Welsh music sector. It generated an output of £153.2 million, and added value £104.5 million (GVA) to the local economy in 2016. The total number of jobs generated and supported by the music sector in the city was 2,500; the total income of these jobs was £75 million.

DIRECT IMPACT

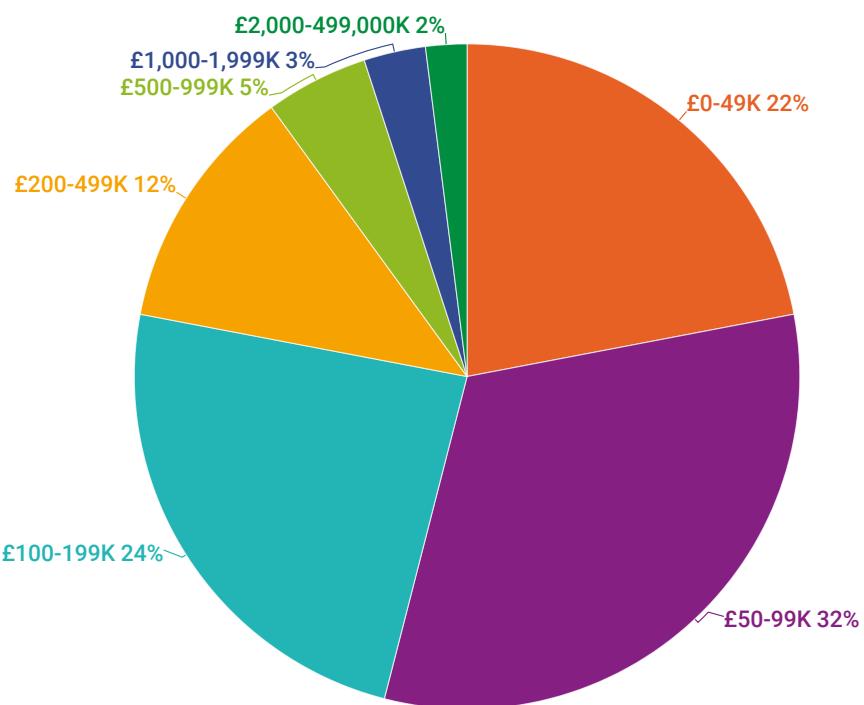
The direct impact reflects the economic value of the core of the music ecosystem within the local economy using four standard economic variables: output, GVA, employment, and wages. In 2016, 200 enterprises, of which 15 were non-profit, made up Cardiff's music ecosystem. These businesses produced an output of £70 million, and an estimated GVA of £37 million. They were responsible for 1,440 employees, which represents 41% of the sectoral employment in Wales.

Annual business turnover breaks down as follows: 22% generated £0-£49,000, 32% generated £50,000-£99,000, and 24% £100,000-£199,000. In other words, 78% of the enterprises are in the three lowest turnover categories defined by the survey (Graphic 1).



Aerial view of Cardiff. Photo: Andrew Hazard

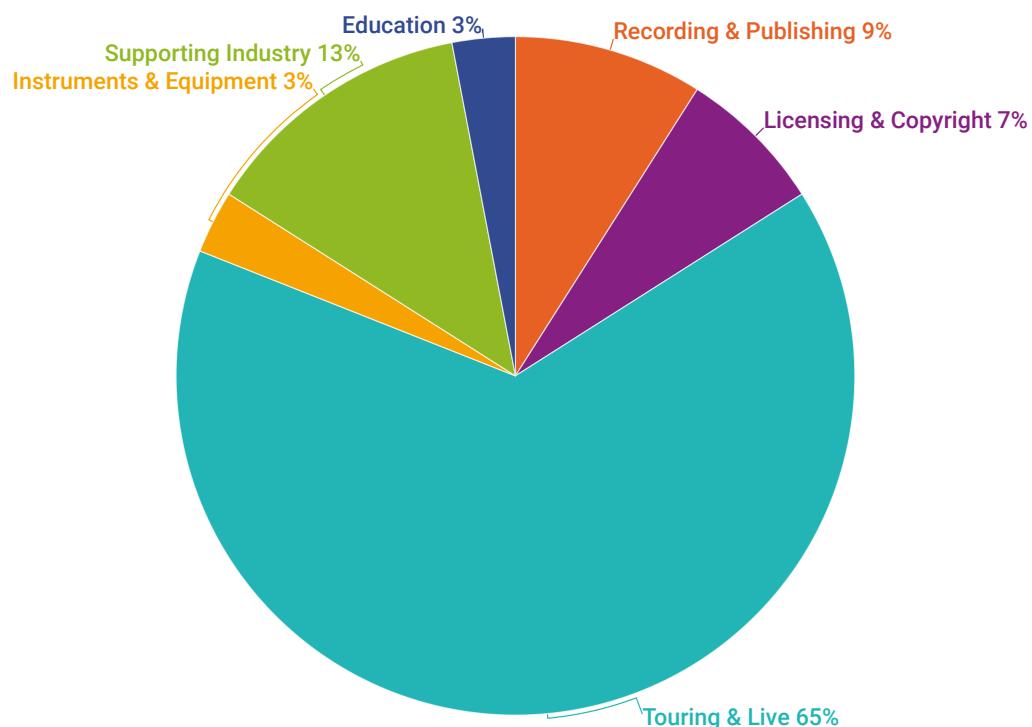
GRAPHIC 1: CARDIFF – MUSIC ENTERPRISES TURNOVER, 2016



Using Standard Industrial Classification (SIC) codes, we found that live music and touring generate the highest output of the music ecosystem in the city, producing 65% of the total income (£45.6 million) and creating 70% of the jobs. Following that are the supporting industries (13% value) and recording and publishing (9%).



GRAPHIC 2: CARDIFF – MUSIC ECOSYSTEM OUTPUT, 2016



DIRECT EMPLOYMENT

We found that 58% of the jobs generated directly by the music sector are full-time (840) and 42% part-time (600). Additionally, 63% of the jobs generated are related to artistic and creative activities⁷, while the remaining 37% is associated with commercial, technical and management support⁸.

Average annual income of artists and creative agents in the music sector is £18,000⁹, with a varied source of income and not necessarily all from music, while technical and management music sector workers¹⁰ earn on average £27,500, an average difference of 44%. These estimates are based on the Annual Survey of Hours and Earnings (ASHE) and the survey carried out by Sound Diplomacy.

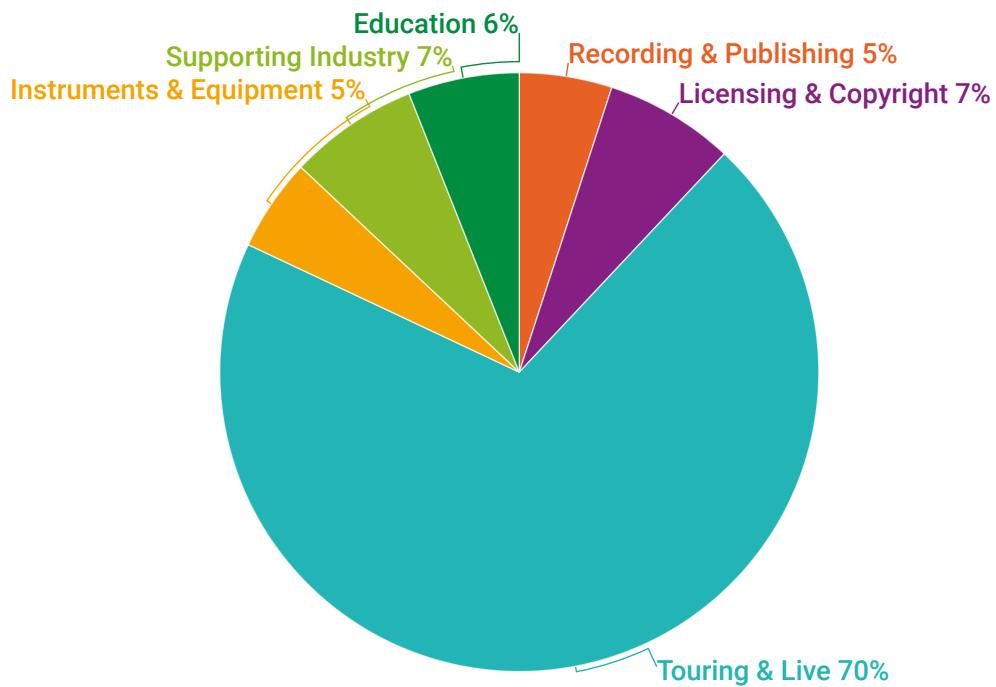
⁷ Artistic and creative activities are those that are involved in the processes of creation and production within the music ecosystem, whether for live music or recorded music, for example musicians, authors, photographers, designers, among others.

⁸ Commercial, technical and management support are those that are related to the distribution and retail of goods and operational and support services within the music ecosystem.

⁹ Slightly below the national salary average for music creators of £20,504 (UK Music's *Measuring Music 2018* report, p12)

¹⁰ Technical and management music sector workers: teaching and music education professionals, audiovisual broadcasting operators, audio engineers, event promoters.

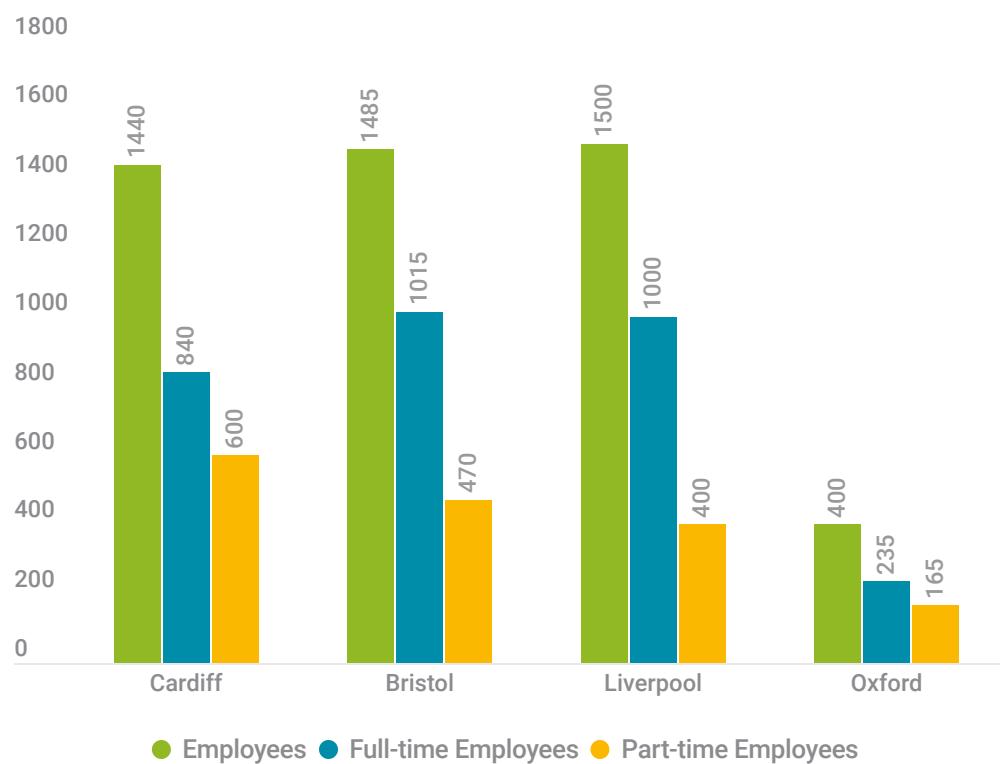
GRAPHIC 3: CARDIFF – MUSIC ECOSYSTEM EMPLOYMENT, 2016



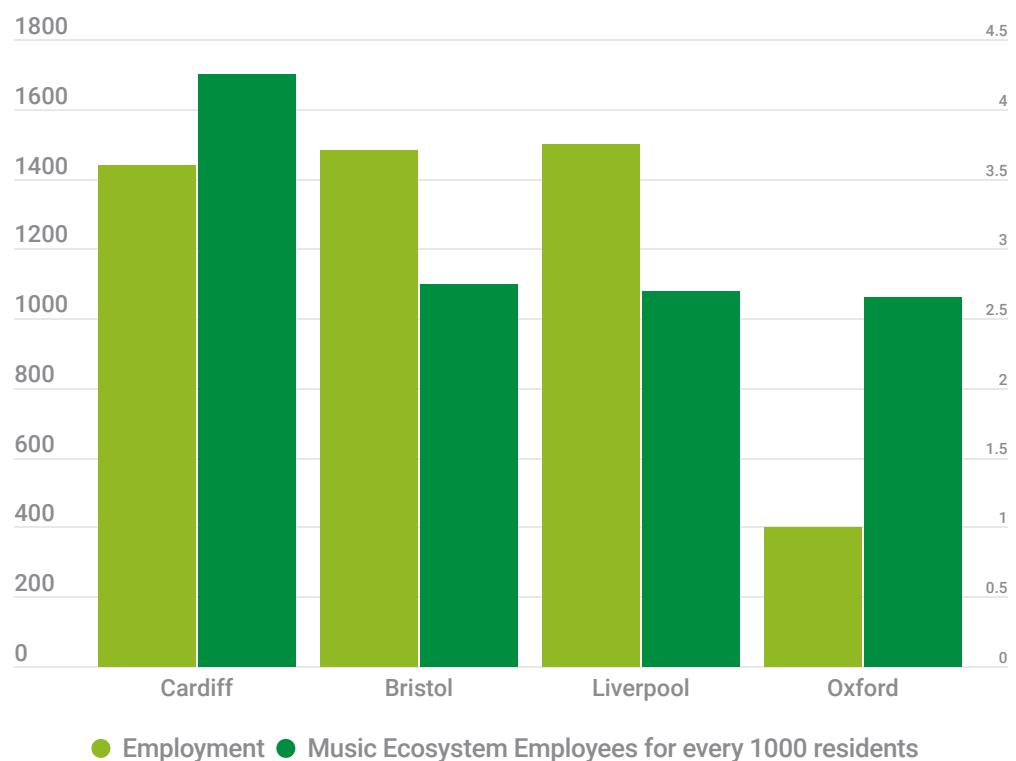
The number of employees working in the music sector in Cardiff is similar to those of Bristol (1,485) and Liverpool (1,500), and much greater than Oxford (400). However, we found that Cardiff generates 4.3 jobs in the music sector for every 1,000 residents, while Bristol, Liverpool, and Oxford only generate 2.7 (Graphic 5)¹¹. This highlights the city's focus on the development of the music ecosystem compared to other cities.

¹¹ Demographic information obtained from the United Kingdom CENSUS 2011

GRAPHIC 4: COMPARATOR CITIES – EMPLOYMENT, 2016

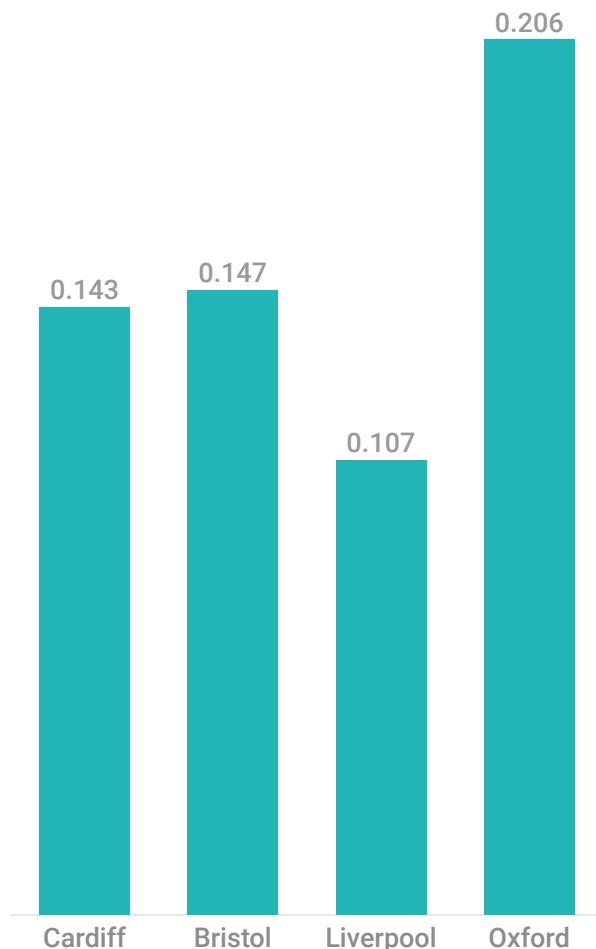


GRAPHIC 5: COMPARATOR CITIES – EMPLOYMENT, 2016



Cardiff has similar numbers of venues per 1,000 residents as Bristol, more than Liverpool and less than Oxford (Graphic 6).

GRAPHIC 6: COMPARATOR CITIES – MUSIC VENUES FOR EVERY 1000 RESIDENTS



Direct impact

Output: £70.23 million
GVA: £36.94 million
Wages: £24.5 million
Employees: 1,440

INDIRECT IMPACT AND INDUCED IMPACT

Indirect economic impact is calculated by looking at the changes in the values of output, GVA, employment, and wages driven by suppliers of the music ecosystem. To do this, we

include measurement of economic exchanges with suppliers that don't necessarily belong to the music ecosystem, such as advertising, video production, and even legal services, communication and transportation.

Indirect impact

Output: £32.97 million
GVA: £24.27 million
Wages: £17.01 million
Employees: 326

The induced economic impact is the economic value (output, compensation and employment) derived by "the spending of workers whose earnings are affected by a final-demand change, often called the household-spending effect"¹². In other words, this impact is derived from the spending of workers whose wages are supported directly and indirectly by the music ecosystem in Cardiff. This includes, for example, the money spent by music ecosystem employees on food, entertainment, transportation, etc.

Induced impact

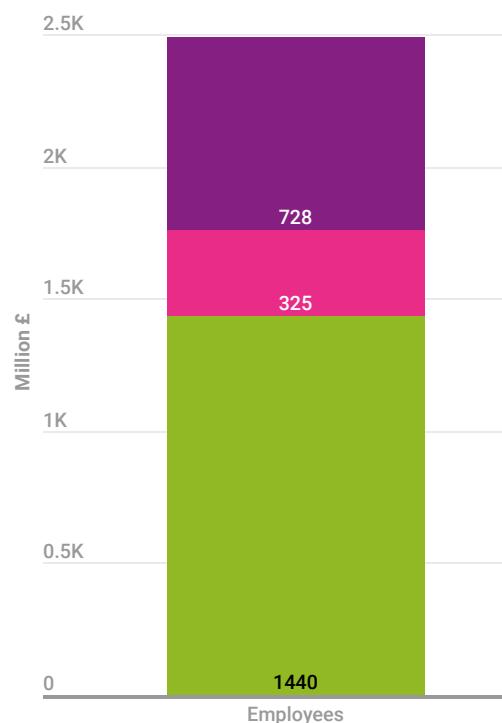
Output: £49.95 million
GVA: £43.32 million
Wages: £33.58 million
Employees: 729

¹² RIMS II: An essential tool for regional developers and planners, page 53.

GRAPHIC 7: CARDIFF - TOTAL MUSIC ECOSYSTEM ECONOMIC IMPACT, 2016

	OUTPUT MILLION £	GVA MILLION £	WAGES MILLION £	EMPLOYEES
Direct impact	70,2	36,9	24,5	1440
Indirect impact	33,0	24,3	17,0	326
Induced Impact	50,0	43,3	33,6	729
Total	153,2	104,5	75	2494

GRAPHIC 8: CARDIFF – TOTAL MUSIC ECOSYSTEM EMPLOYEES, 2016



3.2 Mapping Cardiff's industry

Using Sound Diplomacy's unique tools, we mapped Cardiff's music industry, from venues to businesses and other music assets. There are 36 music venues, 28 nightclubs, 11 record/equipment stores, 29 recording studios, 6 rehearsal spaces, 7 radio stations, 45

registered music teachers, 15 booking agents/promoters, 26 paying festivals, 13 co-working spaces and 7 record labels¹³.

These statistics, when compared with Bristol and Liverpool, two cities of comparable populations (Bristol has 535,907 people and Liverpool has 552,267), show a city keeping up with its competitors. Cardiff has 0.143 venues per 1,000 residents, just behind Bristol, which has 0.147. Liverpool only has 0.107 venues per 1,000 residents.¹⁴ Cardiff also boasts 29 recording studios compared to Bristol's 9 and Liverpool's 13.

The city's nightclubs and music venues are clustered in or around the Central Cardiff area, and most retail points are located on or around St. Mary Street. Recording studios and rehearsal spaces are more evenly distributed.

Cardiff University's main Music Building has over two dozen practice rooms, three ensemble rooms and four electro-acoustic studios, including a main recording studio fully equipped to industry standard. The University of South Wales has recently invested in its ATRiuM facilities, and boasts 9 music and sound studios, with associated control rooms, and 16 acoustically protected multimedia practice rooms. This includes the Gus Dudgeon suite, home to original mixing desk that Elton John recorded *Rocket Man* on, and where Dudgeon produced David Bowie's *A Space Oddity*. Adding to this, the 2011 development of The Royal Welsh College of Music and Drama's new buildings, to compliment existing facilities located in the Anthony Hopkins Centre and the Raymond Edwards Building, include the 400 capacity Dora Stoutzker concert hall and four state-of-the-art full-sized, double height rehearsal studios.

While there are a few co-working spaces in suburban areas, most are clustered in Central Cardiff and the Bay Area, which is in line with the city's vision of the Bay Area becoming a creative hub.

A 90-day calendar snapshot of Cardiff shows 161 gigs listed on Songkick¹⁵. In the same dates, Liverpool had 415 shows. Bristol had the busiest calendar by far, with 740 gigs. While the 'business' and 'creation' sides of the industry look more active in Cardiff, the performance sector falls behind cities of similar size – this could be for a number of factors, including but not restricted to: more weekday, afternoon and evening gigs in Bristol and Liverpool; more venues (although Cardiff has a competitive venue per capita

¹³ Mapping information identified in Cardiff as of July 10, 2018.

¹⁴ Information obtained via economic impact analysis.

¹⁵ Songkick is a worldwide platform that helps users organise and track their favorite bands, get concert alerts, and buy tickets. Their API is the biggest live music database in the world. The period of 90 days was calculated as those dates on the Songkick calendar between 27.8.2018 and 27.11.2018.

ratio, it is still a smaller city than the other two); misleading data (there simply could be less Songkick activity in Cardiff).

3.3 Key findings

GOVERNANCE & LEADERSHIP

There is no government affiliated music office. There is a Public Service Board, a collective of night time economy (NTE) services working towards improving conditions for nightlife and the music industry, although music is never explicitly represented or addressed. FOR Cardiff is one of the biggest champions of night time safety and investment, but music is not part of its core remit. However, it does support it actively at its discretion.

The music strategy recommendations in this document bridges a gap between the public and the private sectors, that together make up the city's music ecosystem. One of the main aims of the report is to create a 'Music Board' for Cardiff that includes high level personnel from the council, alongside key members of the private sector music ecosystem. This will not only bring the public and the private realms together, but will also lead on to the development of music in the city and, in doing so, will open up space for debate and communication between the different stakeholders.

LICENSING & POLICE

Many of the noise-related terms in Cardiff's licensing regulations are 'suggestions' or 'guides', such as ceasing activity at 9pm or consulting with neighbours before building a venue. Statutory nuisances are monitored over three site visits, but are also ultimately left to the attending officer to determine if a venue/noise source is imposing on neighbours. This creates problems with inconsistent enforcement, which can be influenced by an individual officer's definition of 'loud', their personal experience with the venue, or even their mood that evening.

Furthermore, venues' premise category is unspecified in many regulatory frameworks, such as the Cumulative Impact Policy (CIP). As a result, the CIP would place existing and future music spaces at risk in the city centre area due to the cumulative effect that licensed premises have on the amount of crime and disorder in the area, whether they are responsible for it or not.

There is no financial assistance available for venues needing to improve soundproofing to appease noise complaints. This has caused some venues to close, and is an issue which could be considered under Agent of Change (AoC Bill) principles.

Only 2% of all noise complaints between 2016–2018 were made against commercial or industrial properties. Many noise complaints registered with the city do not specify the source (i.e. commercial noise, construction, residential radios, public disturbance on the pavement, etc.), which makes it difficult to look back at complaints and find problem areas or trends to address.

Licenses frequently restrict premises access for certain ages, or limit the hours during which music can be played. Multi-use spaces can also be assigned a single use class to make it easier to determine licensing terms, even if the use of the venue changes during the evening (i.e. a restaurant which turns into a club at night may have to adhere to restaurant regulations at all times). Many prospective licensees are left in the dark during their application processes, as there is no specific framework in place, nor a list of expectations by which they can prepare their paperwork and business plans. By creating a clear list of fees, necessary permits and an estimated timeline, venue owners will find the application process much easier to navigate, and the city will find it much easier to enforce regulations.

While the Traffic Light System is a good means of enforcing license terms, there needs to be transparency in the process. Having spoken to a few venues about this, evidence suggests that they are not aware of whether or not they are being monitored, where they currently stand in the system (Green, Orange or Red), or what they can do to achieve a ‘Green’ status. They are only notified of the existence and implementation of the system once they have been given a ‘Red’ status.

Much of Cardiff’s venue policing is reliant on data sharing, which creates problems in that police can only recognise problem ‘areas’ rather than individual venues. They are under pressure to clamp down on venues within red zones, which is unfair on the venues that do not have a history of offences. Safety measures outside venues (or those issues not directly related to licensing, such as sexual harassment) are often overlooked in policy and are primarily carried out by Cardiff Street Pastors or FOR Cardiff. Overall, our survey respondents said they felt safety was one of the strongest features of Cardiff’s music scene, on average rating their experience 4.1 out of 5.

FUNDING

On one hand, the funding of large events in Wales demonstrates a will to invest in developing a profile in the national music and cultural sectors. On the other, core funding is currently predominantly allocated for the classical music sector, which receives generous support compared to other areas such as music education or contemporary genres. This is not surprising given the high costs associated with classical music, although it often receives financial support from private donors and patrons, something not commonly found in other music genres. Cardiff excels in classical music, with many

orchestras based in the city, including BBC National Orchestra of Wales, Orchestra of the Welsh National Opera, Cardiff Philharmonic and Sinfonia Cymru.

Private funding opportunities available in Cardiff — such as the Development Bank of Wales or the Central Cardiff Enterprise Zone (as well as more generic national companies, of which there are many (e.g. the Start Up Loans Company) — do not have specific support for enterprises in the music sector or the creative industries, which are traditionally challenged by access to conventional private funds such as bank loans.

The Development Bank supports businesses across Wales, and Central Cardiff Enterprise Zone's 'funding' usually translates into the offer of business rate relief. It is worth noting that despite a large concentration of creative industry in the area, The Enterprise Zone does not provide any specific assistance to them.

Respondents to our survey highlighted a lack of sufficient information about the availability of grants for their activities. Indeed, only 10% received one, while the remaining 90% said they didn't because they were not aware of the opportunity or what the steps were needed to access it. It is important to note here that the council has no capacity to deliver grants, but better signposting could be implemented.

Many who received funding for their music activities said it came from the Arts Council of Wales (ACW). According to recent ACW statistics, the average % of all national large grants awarded to Cardiff was 27.2% in 2017/2018 (increasing to 37.2% for small grants of under £5K).¹⁶ There are opportunities to expand the allocated funding for music industry development and Welsh Government schemes to develop a specific strand for Welsh music export activities in collaboration with Wales Arts International.

The BBC Wales' Launchpad Fund provides grants for artists from which a number of Cardiff musicians have benefitted from in the past, but is also part funded by the ACW. The Welsh Government and ACW are now working with PRS Foundation to support more access to Momentum Funding via the PRS Foundation, and Help Musicians UK are currently undertaking research to establish what their presence in Wales may look like, and how they might support artists in Wales.

There are opportunities for developing partnerships with existing funding organisations to create further opportunities for Welsh music industry artists and organisations. Some examples are Tŷ Cerdd (currently focused on non-profit classical music organisations and promotion of Welsh composers), PRS Foundation, British Phonographic Industry, Help Musicians UK and National Lottery Funding – People and Places grants.

¹⁶ See Arts Council of Wales (2019)

SPACES & PLACES

Cardiff has 5 large-scale venues (7,500+ capacity), although only Motorpoint Arena regularly hosts concerts (and feedback from the survey suggests that Motorpoint needs to improve its acoustics). The Principality Stadium and Cardiff City Stadium occasionally host concerts, but overall most venues of this size cater to sports games. Cardiff is looking to build a 15,000+ capacity multi-purpose arena. It is considered a priority by both city and national governments.

There are some gaps in the venue ladder in the city, which leaves gaps as artists progress through the different levels of their career. Evidence suggests there is a need for more dedicated, well-equipped venues that are at a capacity somewhere between bars (which use music as a supplementary product), small clubs and arenas. Survey respondents suggested a mid-sized venue of approximately 2,000 capacity would be optimal. Additional survey comments noted a lack of venues in suburban areas.

A lack of diverse events and venues is a significant issue noted by many survey respondents, particularly in terms of cultural and gender diversity. The survey figures suggest a demand for more non-indie genres and DJs who play music from a wider field (a move beyond a focus on playing drum and bass was mentioned). Genres such as hip-hop, rap, grime, RnB, jazz, world music and electronic genres are under-represented, both in terms of events and performers. A closer working relationship with the city's licensing teams would help ensure diversity in the sector and better understanding of genres and their audience.

Accessibility at venues, and a lack of step-free access on public transport, creates an overall hostile environment for people with mobility restrictions who want to attend events.

Cardiff is working to group media and creative industries, as the city recognises the long-term benefits of growth in research and networks found in clustering industries. The main areas of clustering in Cardiff are Central Square and Cardiff Bay.

PLANNING

Cardiff's planning strategy is presented in the Local Development Plan (LDP), which was adopted in 2016 and runs until 2026, although could be subject to review before this date. It focuses on 8 Detailed Policy areas for development in addition to a set of Key Policies.

There are no policies that refer explicitly to music venues in the LDP, and unlike some cities' Local Plans, the word 'music' is not referenced. That is not to say that there are not several policies to promote and protect music infrastructure, but there is little direct

reference. In the absence of specific policies referring to music venues, each application will be judged on its merits on a wide-range of policies depending on its circumstances. Some of the policies which may apply are referred to below.

In addition, the LDP states support for developing world class 'leisure, culture and sporting facilities' and states the need for community and leisure facilities within strategic housing sites to be developed in the coming years.

Section 106 guidance is a key tool in ensuring developments deliver wider social benefits, focused on residential growth and associated facilities, such as schools, transportation and public spaces. Music venues are not referenced directly and leisure is not specifically considered beyond community facilities. It should also be noted however that community facilities are notable beneficiaries of s106 monies, and are a key provider of spaces for music learning or development.

District Centres prioritise small retail or grocery stores over leisure and entertainment facilities (the LDP states shopping should make up 75% of district centre use)¹⁷. The social and community benefits of a well-insulated and secure music venue must be recognised in order for it to be a consideration within planning guidance.

The economic growth aspects of the LDP is focused on creating new employment opportunities, land to build them on or expanding both existing opportunities and land. By 2026, Cardiff wants to add 40,000 new jobs (to the 2006 figures). In the Central and Bay areas, office space is prioritised, particularly for those catering to research and development fields.

Leisure and entertainment sites are less actively promoted. They are not prioritised in any use classes, and while supported in the LDP, there is less policy depth that relates to leisure facilities and no specific references to music venue infrastructure. Venues, rehearsal spaces, recording studios and other music-related uses are categorised as Class D2 (assembly and leisure) or Sui Generis (general use). Such uses are only actively promoted in the Central Shopping Area, City Centre, Cardiff Bay waterfront and district/local centres. There is a positive focus on leisure developments in the Central and Bay business area. It is worth noting that use classes are determined by the Welsh Government, and as such can't be set by a local authority. As with any other type of application, the applicant will need to demonstrate how their proposal addresses the relevant policies.

The Agent of Change principle was included in the Welsh Government's Planning Policy Wales 10 (2018) which provides country-wide planning guidance and states the following:

¹⁷ TAKE Cardiff Council (2006), pg. 181

“The agent of change principle will be a guiding principle for supporting the evening economy and the development of uses sensitive to the soundscapes experienced in busy commercial centres.” It is too early to assess how Cardiff Council could utilise this guidance to enhance music provision in the city, but it does offer a clear opportunity.

The Welsh Government recently produced the Soundscape Action Plan 2018-2023, but only as a consideration for new developments. It is not sufficiently tied to licensing, which is cause for concern if any future complaints involve premises that existed before the new policies were drafted.

There is a tax relief scheme for the creative industries, but the only music-related use is for important orchestral venues, such as concert halls¹⁸. Recognition of a venue as a national heritage site is often reserved for large elite institutions, such as classical music halls. There are a few other informally recognised sites, such as Clwb Ifor Bach's surrounding land being purchased to protect and allow for expansion with the help of Cardiff Council and the Arts Council of Wales (ACW).

A summary of the planning legislation in Cardiff might conclude that music venues are valued, but that this is not stated explicitly, and are not ranked above other development types or cultural assets. Specific Supplementary Planning Guidance that brings together disparate policy references into a single place may benefit the city going forward, and allow it to best exploit the opportunities that the Agent for Change principle provides. This may be something that should be considered as part of any LDP review process.

TRANSPORT

Long-distance train services end much earlier than Welsh services (trains to London end at 9.30pm, 9pm on Saturdays, while services to Swansea end before 2am, and before 1am on Fridays and just after midnight on Saturdays). This creates a barrier to attendance because some audiences will not want to pay for overnight accommodation or will find it off-putting if they can't make the journey home immediately after the show.

City trains only run until 10.30pm (11.30pm weekends) and many stations aren't accessible for people with disabilities (which also makes it difficult to transport instruments via public transport). There are only 4 night bus routes to suburban areas from the city centre, leaving large areas unserviced. Additionally, 2 of these night buses only run Thursday-Saturday. This is a barrier for people who want to spend an evening in the city, as they have to consider the potentially prohibitive cost of taking a taxi home. The lack of night-

¹⁸ UK Government (2018)

time transport also adds to congestion rates as audiences leave large-scale venues (stadiums or Motorpoint Arena).

The pedestrianisation of streets makes it difficult to access venues for artists who need to transport equipment to and from their gigs. Loading/unloading equipment is challenging at smaller venues, and musicians have in the past been fined for parking in the area. Increased transport (plus increased reliability of transport with the proposed Rapid Transit Corridors) will ease congestion and make outer suburbs more accessible, meaning suburban residents may stay longer in city centre and central residents may travel to the suburbs for leisure.

EDUCATION

The Cardiff County and Vale of Glamorgan Music Service helps students engage in music activities during school hours in 166 participating schools. Although this service provides valuable opportunities for music learning to many students, course fees hinder its accessibility (from £57-£218 per term, donated instruments can be borrowed). This is an acknowledged problem. Recommendations have been made by the National Assembly for Wales for a more organised and centralised approach towards accessible learning for all students¹⁹. Without measures in place to ensure that all students are able to access instrumental lessons, many will miss out on key opportunities. Portfolio organisations of the Arts Council of Wales also invest in music traineeship and educational programmes, mainly classical music and opera.

There are a number of higher and private education options to study music in different forms in Cardiff. Cardiff University has a School of Music, offering undergraduate and postgraduate courses in performance, composition, musicology, ethnomusicology and popular music²⁰. The Royal Welsh College of Music and Drama provides lessons and courses in instruments, composition, conducting, stage and event management, arts management, and design for performance²¹. Cardiff Metropolitan University offers teaching qualifications in PGCE Secondary Music. There are also musical instrument classes at Chapter Arts Centre²², as well as classes in music theory and group workshops at the International Music School²³.

The University of South Wales offers a BA (Hons) in Music Business, the only course of its kind in the city. The university also offers the only MA in songwriting in Wales. There is no workshop or informal training programme for budding music business professionals in the

¹⁹ National Assembly for Wales (2018)

²⁰ Cardiff University (2018)

²¹ Royal Welsh College of Music & Drama (2018)

²² Cardiff Music School (2018)

²³ International Music School Cardiff (2018)

city looking for focused training, nor is there assistance for artists needing to expand skills without taking the long and often expensive route of a degree (This has not always been the case – The Welsh Music Foundation used to do training in Cardiff prior to closure due to funding cuts²⁴).

Our survey results show that 56% of artists and 42% of professionals are self-trained, while only 20% have degrees related to their fields. Business skills are often the hardest for professionals to teach themselves, but are required for those who may be pursuing music performance over an academic path.

On a national level, Welsh Government recently confirmed £3m for improving music services in schools across Wales over the next two years. The fund aims to increase access and opportunities for children and young people in Wales to learn new instruments and study music. It builds on initiatives such as Anthem²⁵ and will offer opportunities to ensure the provision of high quality, universal access to musical education for all students. £1.5million will be spent in 2018/19, with a further £1.5 million allocated for music services next year. National Youth Arts Wales has received £100,000 to continue their music services, including youth ensembles. Other than this, the Pupil Development Grant is the only financial assistance enabling lower-income children to obtain supplies for after-school activities, although music is not directly alluded to. Access to tertiary education is supported by the Advanced Study Music Scholarships from the Arts Council of Wales.

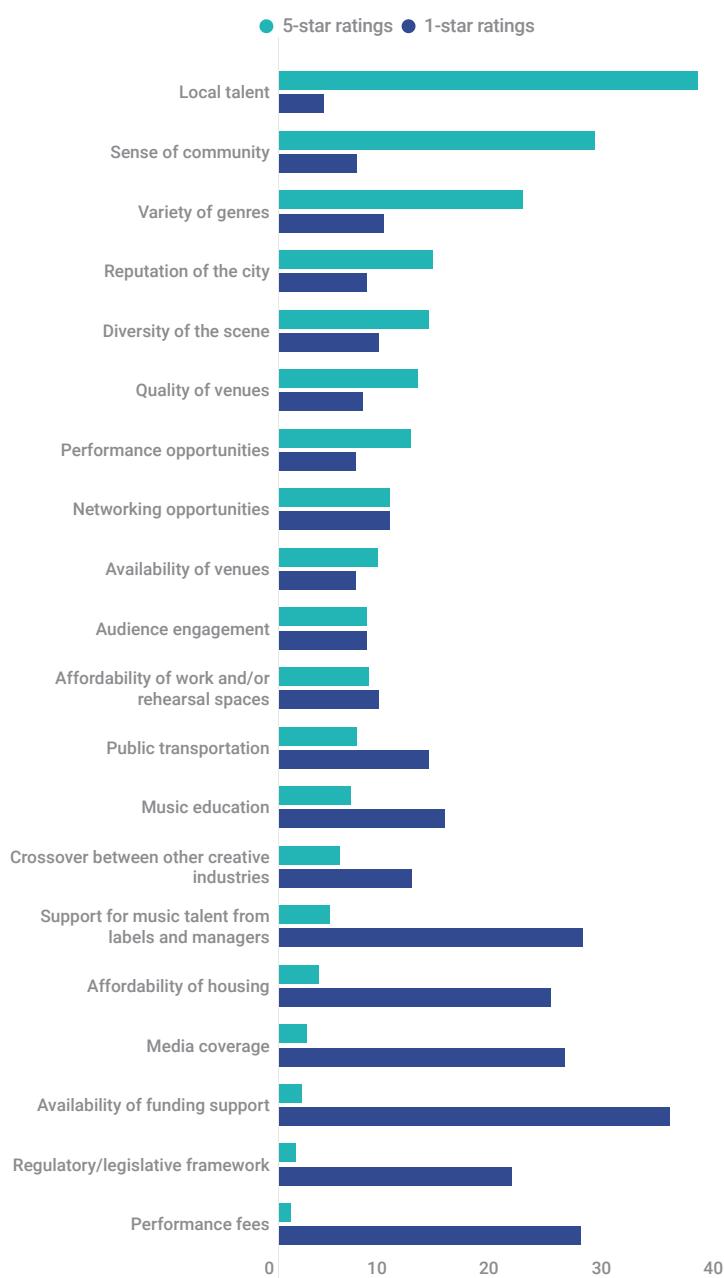
EMPLOYMENT & SKILLS

Our survey results showed that the most common roles in the industry are Live Music Promoter (14.7%), Music Venue (8.6%), Music Journalist/Writer (7.2%) and Music Festival (5.4%). Although we provided 26 different categories to choose from, many other different roles were indicated, showing the diversity and breadth of Cardiff's music ecosystem.

²⁴ BBC, Welsh Music Foundation (2014)

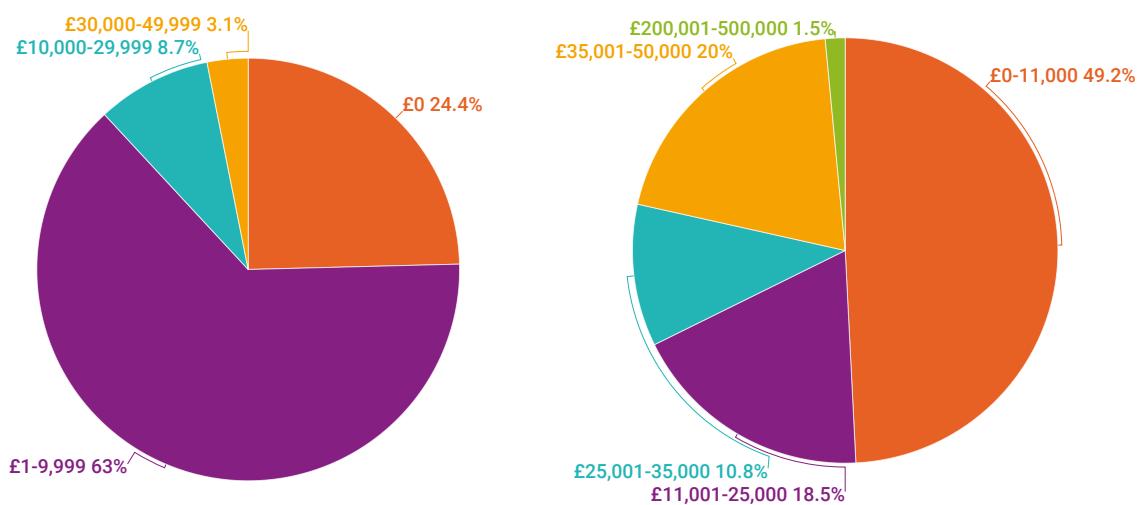
²⁵ <http://www.arts.wales/139279>

FIGURE 1. MUSIC ECOSYSTEM ROLES COVERED BY 'PROFESSIONAL', 'MUSIC COMPANY' AND 'OTHER' RESPONDENTS



The music industry is dominated by commercial enterprises; 24% of surveyed companies consider themselves non-profit or charitable. Only 10% of these businesses' income is from local artists. This translates to artists struggling to make a liveable profit from their craft. Insights into local artists' working patterns show that 71% of them work 20 hours or less in the music industry, with 87.4% of them earning between £0 and £10,000 per year. Many will supplement this income with day jobs, which pulls time and energy away from progressing in their careers.

FIGURE 2. MUSIC-RELATED INCOME FROM 'ARTIST' 'PROFESSIONAL' AND 'OTHER' RESPONDENTS IN THE LAST 12 MONTHS



There is no singular directory aggregating Cardiff's music business, professionals and resources. This can leave many industry players in the dark, particularly DIY artists who may not have the skills or knowledge needed to progress their careers after a certain point. Compiling contact details and creating a base for the network will help bring Cardiff's music industry together. Roundtable discussion held during this project reflected this view, citing the former Directory of Welsh Music Businesses, run by the Welsh Music Foundation, as a valuable resource. Currently, the city's music industry is fragmented, which makes it difficult to move forward with a cohesive vision.

TOURISM & BRANDING

Wales has long been known as "The Land of Song".

According to the *Wish You Were Here 2017 Report of Contribution of Music Tourism to the UK's Economy*, Wales generated £115 million through music, £55 million of which was made

through live concerts and £61 million made through music festivals.²⁶ Among the music attractions were the Green Man Festival, Festival No 6, and Sŵn. In 2017, the number of music-related jobs grew by 18% to 1,908.²⁷ Music tourism and activities have been prime sources of revenue for Wales as a whole, and subsequently for Cardiff too – in fact Cardiff has gone to great lengths to promote its Welsh musical heritage. Welsh Government is also delivering a Wales wide initiative called Dydd Miwsig Cymru to promote Welsh Language Music, with a special focus on a Welsh Language music day each year.

Currently, local venues tend to be visited by people from Cardiff or its surrounding area, while festivals attract more international audiences and larger turnouts. Our survey found a total of 1,706 shows across Cardiff's venues in the preceding year (approximately 4.6 each night). This produced a potential capacity of 10,258, but only 58% of this was filled. Cardiff's venues have a great potential to expand not only attendance levels, but also the number of events, as shown in the findings in Section 3.1.

Live music is still considered a favourite pastime of Cardiff's audience members, with 75% of those surveyed attending at least one music event per month and 96% of these often attending events featuring local and up-and-coming artists. However, the fact the venues are on average just over half full shows that there is still work to be done around audience development, marketing and promotion.

Cardiff's proximity to Bristol means it is in constant competition for audiences. In particular, the city struggles to attract national tours and underage gigs²⁸. There is an opportunity for Cardiff to reassert its place as a music destination while Bristol's Colston Hall undergoes refurbishment until 2020. This strategy worked for Cardiff in the past, when the brief closure of Wembley Stadium allowed the Millennium Stadium to provide an alternative venue to attract artists, promoters and events.

Unsurprisingly, digital channels such as social media are the most favoured means of raising awareness of gigs, although 45% of promoters still rely on word of mouth. A large section of Cardiff's industry uses non-digital means of promotion, as well. There is currently no single, comprehensive source for artists, professionals or fans to access information about live music events. Although dedicated volunteers across the city have designed maps, produced gig guides, fanzines and podcasts and run any number of social media sites to support the music scene — a cross genre listings website would make things accessible for both residents and visitors wishing to see a show or discover new music locally.

²⁶ UK Music (2017b)

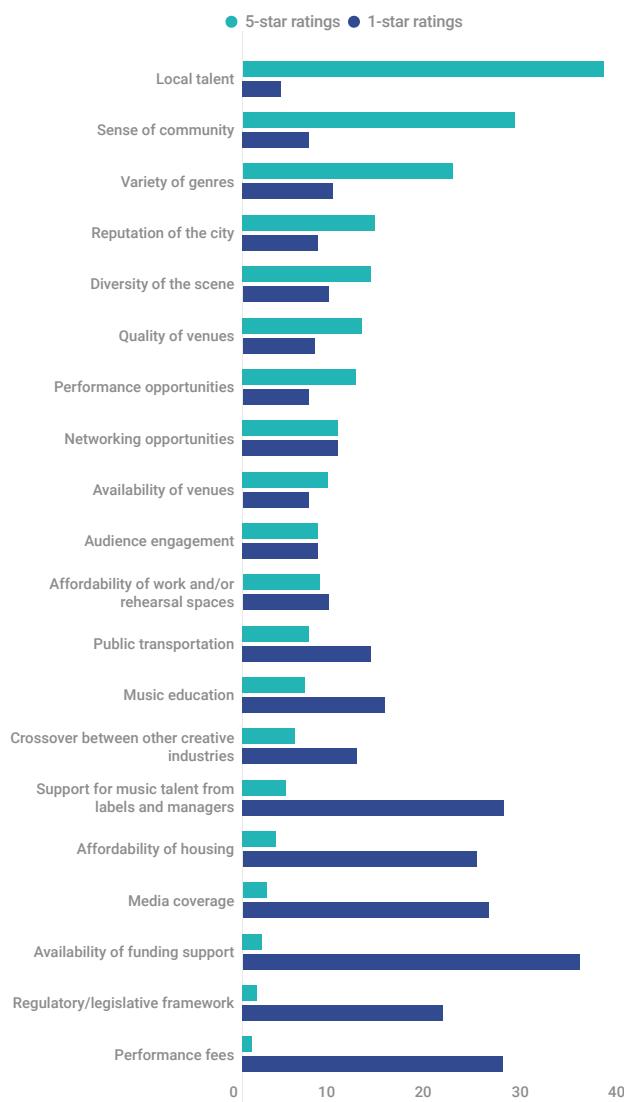
²⁷ Ibid.

²⁸ Anecdotally, we have also been told that Bristol has much more advantageous licensing conditions in which to stage underage gigs.

ASSETS AND THREATS

The survey completed by Cardiff's musicians and music professionals sought their views of the city's music industry as a whole. Respondents were asked to rate a variety of assets in Cardiff's music ecosystem. The average scores range from 2 stars (for performance fees) to 3.9 stars for local talent. The results indicate that while there doesn't appear to be any severe shortcomings, there are also no outstanding results.

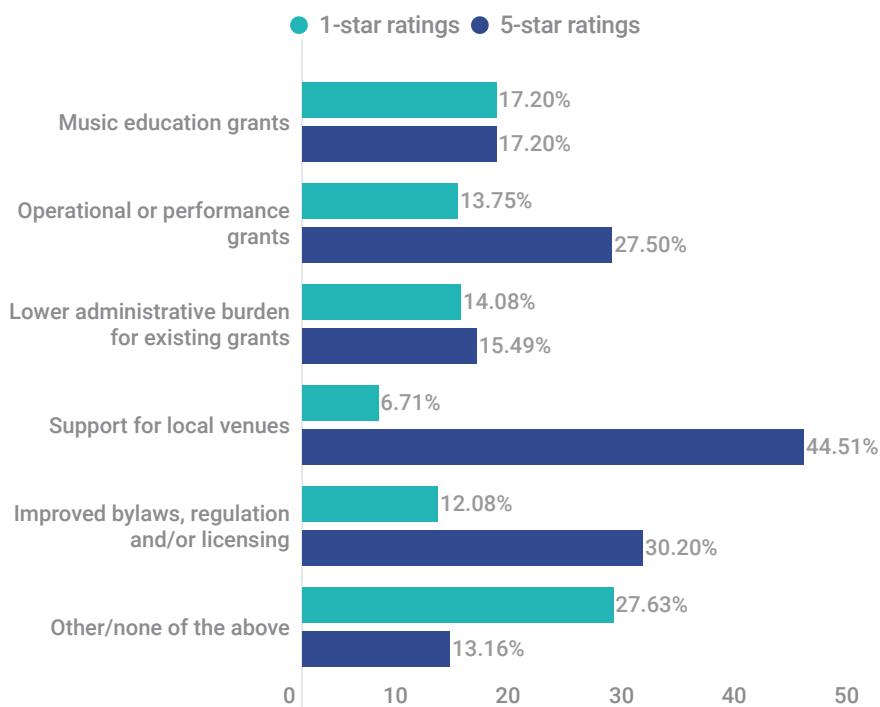
FIGURE 3. OVERVIEW OF 5-STAR AND 1-STAR RATED ASSETS IN CARDIFF'S MUSIC ECOSYSTEM



Overall, the results show that Cardiff music industry professionals believe the city offers a thriving music scene with many events and good audience turnout. However, there is room for improvement. In theory, there is strong support for up-and-coming artists and a good

network of professionals to help create events, although this is not effectively galvanized or communicated to those who would use it. There is a need to develop music business skills. Funding opportunities are scarce, and those that exist are not communicated sufficiently, leaving musicians often unaware of what opportunities exist.

FIGURE 4. RATING OF AREAS TO BENEFIT FROM INCREASED INSTITUTIONAL SUPPORT



A good music tourism strategy would help build an international audience and broaden demographics.

Professionals would also like to see incentives for companies to promote salaried employment and ensure the livelihood of those working in the industry. This was suggested for both creatives and businesses whose interests overlap with them — such as bars and clubs. Interviewees and respondents suggested some measures such as reducing business rates for all music and cultural venues, increasing the number of (paid) gigs in mixed-use and unusual places, encouraging pubs to programme original content and educating musicians on how to negotiate a fair pay (the Musician's Union Fair Play scheme is leading the way in this sector), among others. Cardiff has a great network of people, but it is fragmented; bringing the different parts together would galvanise and strengthen the industry, spurring growth.

Industry respondents ranked financial threats as representing the biggest concern, whether in the form of gentrification pricing artists out of the city, rise in ticket prices

discouraging new audiences, or the lack of sufficient funding and cultural budget at a government level. The fragmentation of the network is also a concern.

4. STRATEGIC RECOMMENDATIONS

GOVERNANCE AND LEADERSHIP

MUSIC OFFICE

RECOMMENDATION 1: WORK PRAGMATICALLY WITH ALL STAKEHOLDERS TO UNLOCK THE POTENTIAL OF CARDIFF'S MUSIC ECOSYSTEM

Initiator: Economic Development / Culture, Venues, Tourism & Events

Background: Cardiff's music ecosystem needs a dedicated driving force. A Music Officer is the minimum asset required for a City's Music Office and will mainly be responsible for overseeing the implementation of the recommendations found in this report.

While many of the following recommendations in this report are relatively low cost, they will require commitment and a lot of work. The appointment of a Cardiff Music Officer would show commitment and resource from the council to deliver these recommendations. The Music Officer will be a mediator who works with all stakeholders to unlock the potential of the music ecosystem and champion its social and economic benefits. There is a gap between the public and the private sectors in Cardiff's music ecosystem. In addition, the scene itself is quite insular and fragmented, with little communication between different stakeholders. A centralised, objective, driving force in the shape of a Music Officer would pull people together.

The officer should sit within the Economic Development and Culture departments and work closely with other relevant officers and departments (Transport, Infrastructure, Planning, Licensing etc), including the Cardiff Music Board and other music organisations in Cardiff.

Goals:

- Lead the dialogue between industry and policymakers
- Connect different sectors (within government and the overall economy) with music
- Become the first point of contact for the music sector when addressing public institutions

- Provide the music sector with easier access to resources and support from the council and other bodies, and guidance on how to navigate the council's bureaucratic processes
- Oversee and reinforce the implementation of a music strategy
- Ensure music is being integrated into as many city policies and development strategies as possible
- Advocate for, and build relationships that can benefit the ecosystem
- Undertake targeted research to better understand audience behaviour in Cardiff
- Align Cardiff's music industry with other creative and entertainment industries – film, broadcasting, theatre, fashion, food, tourism and beyond – so that all can mutually benefit from each other and work together to promote Cardiff locally, nationally and internationally.

PRIORITY ACTIONS:

1.1 Appoint a Music Officer

As noted above, appointing a Music Officer is the primary recommendation in this report. The role itself requires experience of both the music industry and municipal sectors, as well as a deep knowledge of Cardiff's music scene and experience from further afield. The role will require extensive marketing and managerial knowhow, and the ability to bring people together and generate a proactive attitude.

Some of the initiatives Cardiff's Music Office could spearhead are:

- Develop a bilingual micro-site as Cardiff's digital 'music industry information hub', including an 'about' page, contact information, FAQs, links to relevant council or external resources and organisations and direct links to apply and check the status of permits and council-related bureaucracy.
- Act as Secretariat of the Cardiff Music Board — organising the meetings and subgroups, circulating relevant materials, taking minutes, etc.
- Ensure music is being integrated into every council department, via monthly advisory meetings, updates, etc
- Assist/lead bids for large-scale music and music industry events such as BBC Amplify, Music Venues Day, Music Cities Convention. In partnership with stakeholders such as the Welsh Government Major Events Unit, where applicable
- Establish a data protocol to guide an all-genre audience development strategy for Cardiff, in collaboration with the existing Audience Insight project led by Arts Council Wales
- Explore a UNESCO 'City of Music' status
- Promote safe music spaces in line with other initiatives around the UK

- Create and maintain a Cardiff Music Directory
- Lead on the development of Musician Parking Loading Zones
- Offer a ‘Music at Risk’ support service to struggling venues
- Establish a bank of hours with specialists to coordinate one-to-one appointments
- Coordinate workshops and lectures
- Programme quarterly music industry socials to connect music industry professionals
- Work with UK and international artist and professional development organisations to open an office in Cardiff
- Comply with Welsh Language Standards.

The Music Office would work closely with Womanby Street, to continue to promote the street as a music destination and a marker of Cardiff’s ambition as a Music City. A Public Private Partnership (PPP) could help resource the Music Office, and may help to deliver some of the suggested actions and projects.

THE PARTNERSHIP MODEL OF NASHVILLE’S MUSIC CITY MUSIC COUNCIL

The Music City Music Council (MC²) is an association of business directors whose goal it is to develop strategies to increase the awareness and development of Nashville’s reputation as a Music City. This office was formed in 2009 as a partnership between the Mayor’s Office, the Nashville Area Chamber of Commerce and the Nashville Convention & Visitors Corp. In the beginning, the Music Council’s formation achieved the symbolic accomplishment of bridging the gap between Music Row and the courthouse. Prior to this office, the music industry and local government didn’t know how to interact with each other.

The organisation focuses on expanding music-related businesses or facilitating their relocation to Nashville. The office is also working to bring televised music shows and music-related awards shows across all genres to the city and is recruiting music-related events and conventions to Nashville. Since its inception, the all-volunteer body has assisted in multiple economic development successes to attract entertainment-related jobs to the city, including Sony/ATV’s expansion to downtown and Eventbrite’s expansion into Nashville.²⁹

²⁹ Metropolitan Government of Nashville and Davidson County, Tennessee (2018)

NEXT STEPS:

1.2 Build and maintain a business directory of the local music ecosystem

Evidence suggests the former Welsh Music Foundation's Directory of Welsh Music Businesses was a valuable resource amongst Cardiff's music business community. Cardiff's Music Office should develop a directory of the city's music ecosystem stakeholders. This open-source database needs to include contact information and should be regularly promoted and updated so it includes new entries and reflects changes within the sector. It should also include a cultural infrastructure map outlining the specifications, capacities and programming capabilities of venues in Cardiff, so that stakeholders outside the city can find relevant information and book spaces easily.

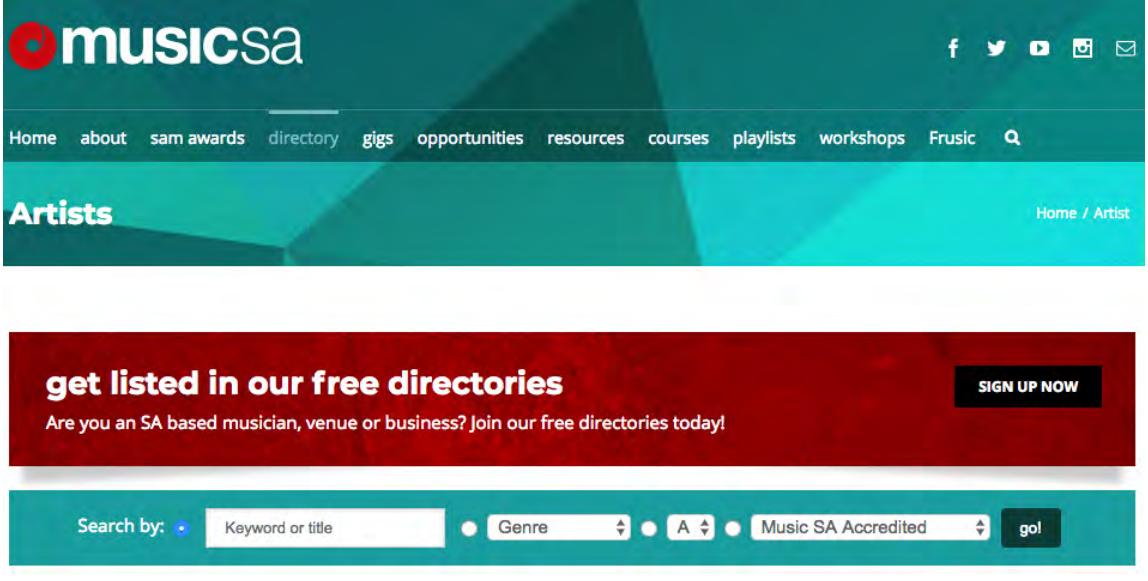
A structured approach and a unified digital database should be the starting point. This will allow transparent communication, keep different stakeholders up to date with anything related to the Music Office, policy updates, new funding opportunities, networking events, workshops, etc. This database will also help inform other research procedures, such as a satellite account, and improve communication within the sector.



Reuel Elijah, Sŵn. Image courtesy Horizons/Gorwelion (BBC Wales & Arts Council of Wales)

MUSIC SA'S DIRECTORY

Music SA's³⁰ website has a one-stop online database of South Australia-based artists, music business professionals and venues. The listing process is free and straightforward, with users providing their details online and a Music SA marketing manager overseeing the process. Listed professionals also get access to special editorial space and promo discounts.

A screenshot of the Music SA website. At the top, there is a navigation bar with links for Home, about, sam awards, directory, gigs, opportunities, resources, courses, playlists, workshops, Frusic, and a search icon. Below the navigation bar, the word "Artists" is prominently displayed. In the center, there is a red banner with the text "get listed in our free directories" and "SIGN UP NOW". Below the banner, there is a search bar with the placeholder "Search by: Keyword or title" and dropdown menus for "Genre", "A", and "Music SA Accredited".

The screenshot shows the Music SA website's homepage with a focus on the "Artists" section. The interface is clean with a green header and a red promotional box for signing up to the directory. The search function is clearly visible at the bottom.

FURTHER ACTIONS:

1.3 Develop a platform to communicate between local residents and music events

The city, through the Music Office, should act as a proactive mediator, engaging in community meetings for residents and venue owners/event promoters in high-activity areas to enable them to work together on sensible solutions and inform residents on city-approved events. A website or online platform should inform people about outdoor events that are happening in the city and provide them with information about curfews, noise limits and offer an opportunity to give feedback.

In the long-run, this platform can be developed to give residents the chance to register support or complaints, automating the process and giving real-time statistics to the city. The platform should leverage collaborations with existing strategies and programmes in Cardiff, such as the FOR Cardiff Night Marshals.

³⁰ Music SA (2018)

'FESTIVAL APPROACH' OF THE REMBRANDTPLEIN, AMSTERDAM

The Rembrandtplein is a bar-filled square in central Amsterdam. The mayor's office worked with the police and the hospitality industry at the square to set up a 3-year pilot project to reduce violence and nightly noise³¹. As part of a series of 'experiments' in the area, facilities on the square have been adapted, new rules for behaviour of patrons have been implemented, and civil 'square hosts' have been appointed around the transport hubs in the busy nightlife districts. The City of Amsterdam has also developed an app that allows people to report antisocial behaviour to nearby community officers.³²

MUSIC BOARD

RECOMMENDATION 2: EMPOWER MUSIC STAKEHOLDERS TO REPRESENT AND CHAMPION CARDIFF AS A MUSIC-FRIENDLY CITY ON THE LOCAL, NATIONAL AND INTERNATIONAL LEVEL

Initiator: Music Office, Cultural Office / Economic Development Department

Background: Creu Cymru exists to bring together arts centres and theatres in Wales, but there's no existing network or forum through which music venues or music professional organisations meet in Cardiff (or in Wales). The take-home from the Cardiff Music Roundtables, and work done by Independent Venue Week in Wales (funded in 2018 and 2019 by Arts Council Wales), demonstrated how valuable facilitated opportunities were for these venues to meet to discuss their work, trends, issues and ideas.

Goals:

- Create a leading representative body formed by a wide range of people with proven leadership ability and influence within the music ecosystem (i.e. the music sector and surrounding sectors such as economics, law enforcement, planning, education, health, environment, tourism, etc) taking care of music matters in the city
- Have an advisory board to help establish, promote and maintain the city as a music-friendly city

³¹ Nacht Burgemeester Amsterdam (2018)

³² Clift (2016)

- Connect with other cities to share best practice, and for information and talent exchange
- Advocate for the sustainability of the music sector in the city, including the affordability of living and working spaces
- Support the development of music activity in the city
- Collaborate with South Wales Police and the Public Service Board to maintain a safe music ecosystem
- Lobby the Welsh Government to increase support for the music sector (eg artist and organisation grants, business support, tax schemes for popular music).

PRIORITY ACTIONS:

2.1 Establish a Music Board

A music board acts as a platform that enables better communication between a city's governing body and its music ecosystem. Often these two worlds don't have open channels of communication and speak different languages, so when they do come into contact with one another, it is often in difficult and accusatory circumstances.

A music board enables people from these and other sectors, to come together in a friendlier, more inclusive way, working toward shared goals. Communication is more open, so meetings also become good sounding boards and give the opportunity to hear issues before they become problematic.

Having said this, the Cardiff Music Board will require a work programme that is publically defendable. It will also be helpful to identify some early 'easy wins' that will provide momentum and excitement about the board's possibilities. The London Music Board has been successful thanks to early investment by the council, and a clear set of objectives that were published online.

- The Cardiff Music Board will require a work programme
- Set up an initial board of 15-18 members
- Insist on a 50/50 gender split, 15% BAME representation and Welsh Language speakers
- Host the first meeting at City Hall, but also host subsequent ones in different venues around the city
- 12 month memberships are recommended to begin with some tenures extensions to ensure continuity of business.

Prospective members have to agree to the Terms of Reference and declare any conflict of interest before being accepted onto the board. Depending on their area of expertise, they

may be asked to carry out actions within a deadline through the course of their membership. They also have to sign a member agreement that outlines their commitment. The setup includes a chair, a secretariat, and the members. Different working groups should be set up to focus on relevant topics. The working groups can be temporary to meet specific needs. The board would be coordinated by the Music Office. Guests and observers can be invited on meeting by meeting basis, either to present on a topic (guest), or to sit in on a meeting (observer).

LONDON MUSIC BOARD

The London Music Board³³ was created in response to a need for the development of grassroots venues, and the implementation of recommendations noted in the Mayor of London's 2015 Rescue Plan for Grassroots Music Venues. The Board meets 4 times per year and is expected to support and advise on research and guidance, to network, attend events, host roundtables and champion music as part of a drive to increase tourism in the city. Formed of 21 members, the expert board has a clear strategy and has set goals to work towards in order to benefit the local grassroots music scene.

NEXT STEPS:

2.2 Create a Cardiff Music Board Professional Organisations Sub-group

This Cardiff Music Board Sub-group would exist to bring together expertise on behalf of professional music organisations and promoters, to network and share information that would support the work of the Music Board. In time, the group might choose to formalise as its own consortium so it can lead and deliver on projects specific to professional organisations, while also providing expertise and support to the Cardiff Music Board.

2.3 Create a Cardiff Music Board Venues Sub-group

The Cardiff Music Board Venues sub-group would exist to bring together Cardiff music venues to network and share information. This group may work to maximize opportunities and reduce any negative impact of stadium or council events. The results from this can feed directly into the Cardiff Music Board, and vice versa, so meetings should be set at intervals that allow time for the information to be processed. Just as with the Professional Organisations Sub-group, the group might choose to eventually formalise as its own consortium so it can lead and deliver on projects specific to venues.

³³ Mayor of London (2017)

Regarding 2.2 and 2.3, evidence we gathered at roundtables and in consultation suggests just how much people and organisations want to be able to gather in such a setting, but there is no system in place to take the initiative. Some of the positive outcomes from these meetings could include: Scheduling and clash-avoidance; working together for bigger impact; sharing priorities or campaigns as organisations; joint lobbying; audience development; and leveraging more resource and efficiency.

FURTHER ACTIONS:

2.4 Strengthen and further develop inter-city collaborations

Joining an existing Music City network such as UNESCO Creative Cities or the Music Cities Network will strengthen and amplify the benefits of implementing a music-friendly strategy. Existing sister city partnerships could also be leveraged through music to strengthen the cultural connection between Cardiff and other cities.

Additional options for collaboration with existing music cities include developing a 'Music City Sisterhood' to share best practices in policy and encourage artist exchange (similar to Austin-Toronto's Music City Alliance) and developing a city-led music industry exchange network, such as the Music Cities Network's Residency Programme.

LEVERAGING OPPORTUNITIES WITH SISTER CITIES: STUTTGART AND NANTES

Germany, France and the UK are the three biggest music markets in Europe, and widening the collaboration between Cardiff's German sister city Stuttgart, and Nantes in France would be beneficial for their music ecosystems.

Stuttgart

Stuttgart has an active music scene and an operating music office: Popbüro Stuttgart, a non-profit organisation that supports artists and businesses within the region. It provides studio equipment, helps with tour buses, consults on music industry matters and connects the scene within Stuttgart and internationally. It also supports bands with small grants for tours abroad.

Nantes

Nantes not only installed one of the first night mayors in France, it also has an outstanding music hub. Funded by a coalition of public and private organisations, Trempolino is deeply rooted in the community. It is structured as a 'music campus'

within the publicly-funded creative hub Les Fabriques Laboratoire(s) Artistique(s)³⁴. Trempolino is considered a ‘project for projects’ and its organisation is made up of 29 staff, 8 specialist music teachers and 16 advisory members. It also engages around 80 freelancers to deliver workshops, and provides learning opportunities for over 50 interns and trainees simultaneously.

The music hub is conceived as a grassroots community and research centre, therefore its services and artistic programming is aimed at music fans, musicians and music professionals from all ages and backgrounds. Membership is required (€5 annual fee) to book the rehearsing and recording facilities, while the exhibition and performing space is available to any organisation. Provision of financial support is available if it is needed for delivering content at the venue. Most of the services and support provided through the Music Office comes from the Pays de la Loire region, including the available grants, financial support and distribution networks.

As Cardiff is twinned with Stuttgart and Nantes, the existing partnerships could be strengthened through artist exchanges and festivals that collaborate by booking each other’s bands. The cities could develop residencies for artists as well as business exchange programmes.

MUSIC CITIES NETWORK³⁵

Music Cities Network is a public/private network dedicated to improving communication and cooperation, sharing research and knowledge, exploring policy and advocacy, and networking. It is used by policy makers, city leaders and all other Music City stakeholders. It has a structured, tiered membership. Its top tier, ‘Regular City Members’, costs roughly EUR 5000 to join and currently includes the cities of Aarhus, Berlin, Hamburg, Groningen, Nantes and Sydney.

In addition to its regular membership services, Music Cities Network also offers:

- Residency Programme
- Presentations and showcases at industry events
- Audience development programme
- Women in Music Index

³⁴ Les Fabriques (2018)

³⁵ City of Austin (2017)

LIVERPOOL UNESCO CITY OF MUSIC

Liverpool's music heritage is one of its biggest touristic assets, and its music tourists spent £135 million (direct and indirect) in 2016³⁶. The city was designated a UNESCO City of Music in 2015, which allows it to use creativity and music to create a sense of place, grow the visitor economy, and to reposition the city's image, among other goals. For these reasons, music has a predominant role in its Visitor Economy Strategy³⁷, and tourism has a predominant presence in its City of Music Strategy³⁸, although none of them include specific recommendations to capitalise either assets.

Liverpool uses its Beatles legacy with exhibitions such as The Beatles Story, The Beatles Magical Mystery Tour and tours of some of the artists' childhood homes. There is also a Beatles-themed hotel, Hard Days Night Hotel, which boasts a range of artwork and Beatles-based decoration. Additionally, the British Music Experience launched in March 2017, celebrating the best of British music heritage. It boasts a range of memorabilia and exhibits from the Spice Girls to Freddie Mercury, as well as interactive parts such as instruments that can be played.

The official tourism website for Liverpool, visitliverpool.com³⁹, lists music separately from Arts and Culture under "Things to Do", which is a clear indicator of the importance of music to its tourism sector. The site highlights the Philharmonic Hall. Both the general music site and the Philharmonic Hall site list music attractions and events, including general information, and prices and dates when necessary (and links to buy tickets). The website also offers a search engine, "What's On" that outlines things to do in Liverpool and can be filtered by type, including music as a filter.

The City of Liverpool, through Culture Liverpool, organises events such as Liverpool International Music Festival and the Mersey River Festival. Culture Liverpool's website⁴⁰ also offers a wide overview of events, and they can also be filtered by type. On the national level, Heritage Great Britain contribute to the city's branding and tourism by promoting and sponsoring events, as well as through marketing campaigns.

³⁶ UK Music (2017) *Wish You Were Here 2017: Contribution of Live Music to the UK Economy*, p. 39.
https://www.ukmusic.org/assets/general/Report_WYWH_17.pdf

³⁷ Liverpool City Region Local Enterprise Partnership (2015) "Visitor Economy. Strategy and Destination Management Plan" online at <https://www.liverpoollep.org/wp-content/uploads/2015/06/wpid-lcr-dmp-2015-2025.pdf> accessed 11-7-2018

³⁸ BOP Consulting (2018) "Developing a Liverpool City of Music Strategy" online at <http://bop.co.uk/assets/others/Developing-Liverpool-Music-strategy-February-2018-1.pdf> accessed 11-7-2018

³⁹ Visit Liverpool [Website] online at <https://www.visitliverpool.com/>

⁴⁰ Culture Liverpool [Website] online at <https://www.cultureliverpool.co.uk/>

MUSIC-FRIENDLY LICENSING & POLICIES

RECOMMENDATION 3: REVIEW EXISTING LICENSING ARRANGEMENTS TO PROMOTE A 'MUSIC-FRIENDLY' CITY

Initiator: Music Office (Music Officer/Chair of the Board) / Economic Development Department

Background: Cardiff Council's Licensing Policy runs until 2021. It was created through consultation with many partners, although the music sector was not involved in the conversation. The licensing and enforcement for premises in Cardiff lack a specific regulatory framework, as is the case with music venues and nightclubs. The uncertainty this absence creates for owners and promoters is aggravated by the intensive bureaucratic process surrounding premises and events licences. Furthermore, the music venues premise category is unspecified in many regulatory frameworks, such as the Cumulative Impact Policy. There is a perception among venue owners and promoters that certain genres of music/events are policed more strictly than others (eg higher security standards, not receiving events license approvals, etc).

Goals:

- Ease and standardise the process used to request the licenses and permits needed for music activities such as outdoor events, opening a venue or starting a music business
- Increase diversity in the music ecosystem
- Develop sensible solutions and partnerships to address anti-social behaviour and nuisance related to licensed premises, including music venues
- Support all-ages access to concerts.

PRIORITY ACTIONS:

3.1 Streamline permits and licenses required for music activity

The establishment of a Music Office is one way to make these processes easier, but the development of an online guide or app that streamlines the bureaucratic requirements will make the process clearer and therefore support the work of the Music Office. By making the processes less onerous, music producers and promoters will be encouraged to carry out more music activities.

3.2 Reassess security requirements for venues and events

The city, ideally through the Music Office and Music Board, should work with a range of stakeholders — from the government to venue owners, police, the Public Services Board, transport and infrastructure — to identify how to alleviate and standardise security requirements for dedicated live music clubs and events where appropriate. This reassessment should consider reductions for music venues that have a good safety compliance record (i.e. according to the Traffic Light System and other relevant policing measures), as well as those who are burdened by the costs of the security requirements imposed on all licensed establishments. As a start, this reassessment could be approached on a case-by-case basis with promoters and venues, to assess possible solutions for regulations such as the additional capacity limits dependant on adequate fire exits, staff training options, smoke alarms, security staff requirements, CCTV, etc.

A live music and safety stakeholders forum (i.e. a Cardiff Promoters and Police Forum) would promote good practice and frequent communication during the implementation and evaluation of this recommendation, so that challenges faced both by promoters and police can be openly discussed in a safe environment and addressed in a proactive way. For instance, the London Promoter Forum supported by Metropolitan and City Police⁴¹ had a key role in the Met Police's dismissal of the Promotion Event Risk Assessment Form 696⁴², a form that intended a collaborative approach to the management of licensed premises but, in practice, targeted grime, garage and R'n'B acts unfairly⁴³.

In the long term, Cardiff should develop a clear guide outlining licencing and safety responsibilities of music venues in particular, similar to the case of the 'Live Music Licence Conditions Matrix' explained below.

LIVE MUSIC LICENCE CONDITIONS MATRIX, VICTORIA (AUSTRALIA)

An agreement regarding alcohol licences for live music venues was reached on 6 October, 2010 between representatives of the live music industry, the Victorian Government and the Victorian Commission for Gambling and Liquor Regulation (VCGLR)⁴⁴. The parties involved agreed that "live music does not cause violence", and committed to implementing the Agent of Change principle in 2011 and reviewing the restrictions imposed on live music performance by existing licensing and alcohol regulations. Other measures implemented included a help desk with dedicated

⁴¹ https://www.facebook.com/events/404142732962526/?active_tab=about

⁴² London Metropolitan Police (n.d.) "Form 696". Online at <http://democracy.brent.gov.uk/documents/s28414/TEN%20696%20new%20form%20WITH%20696A.pdf>

⁴³ Mayor of London (2017) "Mayor orders review of Form 696 for music events in the capital". Online at <https://www.london.gov.uk/press-releases/mayoral/mayor-orders-review-of-form-696>

⁴⁴ State Government of Victoria (2010)

licensing officers to assist licensees providing live music in navigating the alcohol licensing system and, since 2013, a 'Live Music Licence Conditions Matrix' (the Matrix).

Owners of a live music venue can apply to remove the requirement of crowd controllers and CCTV free of charge, assessed by the Matrix, which sets out standard licence security conditions. Venues providing live music and trading after 1am should submit a management plan to VCGLR complying with their guidelines, which is then provided to the Victoria Police for comment. The management plan takes into account varying conditions, depending on the venue's planning permit, trading hours, capacity and history of compliance.⁴⁵

3.3 Improve access to live music events for under-age audiences

One of the key areas that should be reassessed is under-18s access to licensed venues while a live music performance (acoustic or amplified/electronic) is taking place. Due to alcohol licensing restrictions, it is currently difficult to host underage gigs in traditional music venues in Cardiff. Alternative spaces (eg churches, halls, schools) could be used for all-ages concerts with fewer restrictions and licensing issues. These spaces provide a safe, controlled environment for young people to experience live music.

ALL-AGES ACCESS TO MUSIC AND ENTERTAINMENT VENUES IN CATALUNYA⁴⁶

Under Catalunya's regulatory framework, owners of licensed premises are responsible for deciding if under-18s (the legal age to consume alcohol) are allowed in their venues. The current policy allows people aged 16 and older to be in premises classified as nightclubs, entertainment venues, dance halls, music venues and music bars as long as live music activities are taking place. Under-16s must be accompanied by a supervising adult and must leave the premises after the show. Requesting IDs for proof of age prior to entering the venue or purchasing alcohol is strictly enforced.

This regulation is overseen by different measures depending on the size (by square metre) of the premises and includes on-site inspections by the authorities, CCTV monitoring, installation of 'person-counting' cameras and infrared cameras or sensors. Although there is not a specific grant or support for music venues to cover security costs, they are eligible for the general grants available to private and community businesses issued by the regional and local authorities.

⁴⁵ Victorian Commission for Gambling and Liquor Regulation (2013)

⁴⁶ Departament d'Interior, Relacions Institucionals i Participació (2010)

3.4 Introduce Musician Loading zones for venues in city centre

Bands need to park close to the venue they're performing at for a short time to load and unload equipment. Evidence from our roundtables suggests that musicians are currently being fined quite regularly as they attempt to park close enough to make the loading and unloading viable. This is hurting them financially, in some cases wiping out the little profit they may be making in the first place. Venues should be able to coordinate with the council to provide access zones for musicians and technicians while loading in and out of venues. This will allow musicians and venues in the city centre to address issues around load in/load out on match and big event days at the Principality Stadium, as roads are blocked off for hours at a time.

MUSICIAN LOADING/UNLOADING ZONES, AUSTIN (USA)

The music offices in Austin (ATX Music) collaborated with the Austin Transportation Department to provide Musician Loading/Unloading zones for performers at venues in Downtown Austin. Venue owners can obtain these 30-minute active loading and unloading zones that help to manage traffic in congested downtown areas while increasing safety for performers handling their musical gear. Venues are responsible for requesting, paying for, and keeping track of each permit, which costs US\$25, and also covers a signpost to designate the space.⁴⁷

3.5 Create a voluntary busking guidance for Cardiff that reflects residents, businesses and musicians needs

Busking on public land is legal in the United Kingdom. Surveys show that the majority of the public think busking is an asset to a public space. It animates the environment, provides entertainment and makes the area feel safer⁴⁸. To nurture a high-quality thriving street performance scene, we recommend implementing a common-sense Buskers' Code drawn up by all parties: performers, local council, police, residents and businesses. This should form the basis of creating a harmonious positive relationship between performers and their surrounding environment. Busking is not a general nuisance that needs to be controlled. But in some cases, there may be a small minority of performers who fail to follow the code. Existing legislation listed below can be used to address these problem performers.

We do not recommend the introduction of Public Spaces Protection Orders (PSPO) to address excessive levels of noise, nuisance, annoyance, danger or risk of harm or injury caused by street entertainment activities to residents and businesses. These issues can be

⁴⁷ City of Austin (2017)

⁴⁸ London Street Performance Research, University of Westminster (2016)

dealt with under existing laws, as explained below. Introducing a PSPO is unnecessary and conveys a very negative message regarding street performance. Some cities and boroughs have considered (or have temporarily attempted) the licensing or PSPO route. We have yet to find one that thinks it was the solution to any busking-related issues. This is because it is far too costly and labour intensive to implement and police a regulated scheme on public land. In practice, unlicensed performers still perform on public land even when a licensed scheme is in place, because officers are not present at all times to monitor and enforce it.

Research carried out by Busk in London over 4 years, showed that most busking complaints actually relate to a small handful of performers and complainants. It is more effective to target individual complaints than blanket punish the busking community as a whole. Welcome and encourage new talent to perform on your streets. This will dilute the few problem performers that might exist.

From our experience, introducing licensing does not work. It is extremely hard, time-consuming and costly to regulate. In areas such as the London Borough of Camden, which went down the licensing route, unlicensed buskers continue to play. A preferred policy is to encourage performers to move around and play at a variety of locations. If buskers have to pay to get multiple licenses to allow them to play in different areas, this becomes prohibitive and encourages them to remain in the same place.

We recommend creating a busking taskforce that collaboratively draws up a Buskers' Code that everyone agrees with. In addition, the city should create as many high-quality busking pitches around the city as possible so that there is not too much demand on high footfall areas.

PLAYING BY THE RULES

Anti-social behaviour

- If your behaviour is unreasonable and you are having a persistent, detrimental effect on the quality of life of people in the area, you will receive a verbal warning.
- If you carry on, you could be issued with a formal warning letter, followed by a Community Protection Notice under the Anti-social Behaviour, Crime and Policing Act (2014).
- If you breach the notice, you could be fined or have your equipment seized.

Noise nuisance

- If you use amplification after 9pm you could be charged under the Control of Pollution Act 1974.
- If a sound is causing a persistent, detrimental effect on a person's quality of life, it could constitute a noise nuisance. If you are the cause of this sound and receive complaints you may receive a Noise Abatement Notice under the Environmental Protection Act (1990). If you breach this notice, you could be fined or have your equipment seized. The most common causes of noise complaints are: volume at an unreasonable level; playing the same music repeatedly; not moving regularly.

Obstruction of the highway

- If you or your audience block people's path you may be causing an obstruction and told to stop. If you carry on you could be charged under the Highways Acts (1980)

Intimidation or conflict

- If anyone is breaching the peace or intimidating others the police will take action. The person could be charged under the Public Order Act (1986).

LIVERPOOL: A GUIDE TO BUSKING⁴⁹

In 2015 a best practice guide for busking was produced in Liverpool. Believed to be the first guidance of its kind in the UK, it was developed by the Musicians' Union, the Keep Streets Live Campaign, the Business Improvement District and the city council. Busking is seen as an important part of the city's cultural life and as an asset that adds colour and animation to public places.

The guide is intended for buskers, residents, businesses, police and the local authority. It contains some key recommendations to promote and foster positive relations between users of shared public spaces in the city. It focuses on dialogue, consideration and compromise on all sides (Liverpool City Council et al. 2015:2).

The approach aims to engage the respective parties in a constructive dialogue to resolve any potential conflicts amicably without the need for a formal complaint (Ibid.:3).

Only as a last resort where performers have repeatedly failed to follow the guidance will

⁴⁹ Musicians' Union (2015a)

enforcement action be taken (*Ibid.*:7).

The guide also initiates regular open meetings between buskers in Liverpool to discuss any issues that arise and to maintain positive relationships. It is also possible for buskers to meet regularly with the council to maintain an ongoing dialogue (*Ibid.*:13).

GRANTS AND FUNDING

RECOMMENDATION 4: ECONOMICALLY SUPPORT DIVERSITY IN THE CITY'S MUSIC ECOSYSTEM

Initiator: Music Office, Cultural Department / Economic Development Department / Welsh Government Department of Culture, Tourism and Sport

Background: In our survey, 'music education grants' received the lowest ranking of priorities that would benefit from government support, and only a small number of the respondents from all categories had previously applied for a grant. At the same time, the sustainability (or lack thereof) of Lottery funds available from Arts Council of Wales (ACW) will impact the music industry funding strands that largely benefit artists and businesses in Cardiff. Many of the career development opportunities in Cardiff are funded by partnerships between ACW, government, public and private organisations, including BBC Wales' Horizons/Launchpad Fund, the Welsh chapters of PRS Foundation's Momentum and Beyond Borders, and the ACW's Portfolio organisations, which overall cover a wide diversity of musical genres and areas of work. These help bridge the accessibility gap for opportunities in the pathways for commercial music overall, although they also maintain the necessary support to the pathways available for formal (classical) education. While still in very early stages of development, Anthem (Music Fund Wales, an endowment fund for young people and music being set up at the moment), could potentially provide new partnerships, funding assistance and strategic interventions to foster opportunities for young people through their music development. The fund is at the capitalisation stage and aims to be fully operative by 2021.

Goals:

- Promote transparency and raise awareness of grants
- Maximise the support available to the great diversity of the city's music ecosystem
- Contribute to the growth and sustainability of both the not-for-profit and for-profit music sectors

- Encourage accessibility to the live music ecosystem for underrepresented audience groups, including people with diverse abilities
- Align support for the music ecosystem with the future Welsh Music Endowment Fund (pan-Wales) to expand funding opportunities in Cardiff. The fund will operate for an age range of 3-25
- Weigh opportunities to increase available cultural funding at the local level from contributions of the private sector.

PRIORITY ACTIONS:

4.1 Enable a collaboration framework for funding partnerships

Budget cuts to publicly-funded arts and culture frequently result in underfunded or cancelled projects and limited staff capacity. This major development challenge can be partially overcome by joining forces with other organisations to support the local sector. Cardiff Council (spearheaded by the Music Office) should support its music ecosystem by building on the relationships with key Welsh Government supported institutions such as Arts Council of Wales, Creative Wales (once operative), existing partnerships with Creative Cardiff, and private organisations, via a formal collaboration framework that creates mutually beneficial relationships for the Welsh creative ecosystem in general. The collaboration framework could be established as a cooperation agreement or Public Private Partnership. It should involve regularly scheduled meetings and updates, and a set of clearly defined and aligned long-term goals. Eventually, this partnership framework will lead to leveraged funding and resource relationships through the key mechanisms further proposed in this report, including cultural placemaking and rolling out recommendations from the UK Cultural Cities Enquiry.⁵⁰

4.2 Communicate all existing funding opportunities for the Cardiff music sector in a clear, accessible channel

Ideally, this information would be included on the Music Office's website, and news spread through the office's channels and sent to all subscribers in due time. All requirements, deadlines, resolutions and any other relevant information need to be clearly identifiable on the site. The website should be regularly updated, and application processes must be hosted on the same site. Contact information must be easy to find on the website (including a phone number). Resolution motives need to be transparent. The platform should also include information on how to access support and other opportunities

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<https://www.corecities.com/sites/default/files/field/attachment/Cultural%20Cities%20Enquiry%20%5Bweb%5D.pdf>

available abroad as supported by Cardiff Council (eg British Council programmes, city partnerships, etc).

DIVERSE SUPPORT PROGRAMMES BY MUSICBOARD BERLIN

In 2013, the Berlin Senate set up Musicboard Berlin. Dedicated to the local pop and contemporary music scene, the board offers support to projects that cover both national and international scope. The yearly budget of the Musicboard Berlin is €1.7 million (€250,000 goes towards financing the Berlin Music Commission). There are 5 funding programmes for artists and groups to apply for. In 2017, 48 projects were funded across 2 of the programmes, 19 musicians received support funding, 31 musicians received help from the Scholarship and Residency fund and 12 festivals received funding. That year's funding pool also helped support 183 events⁵¹.

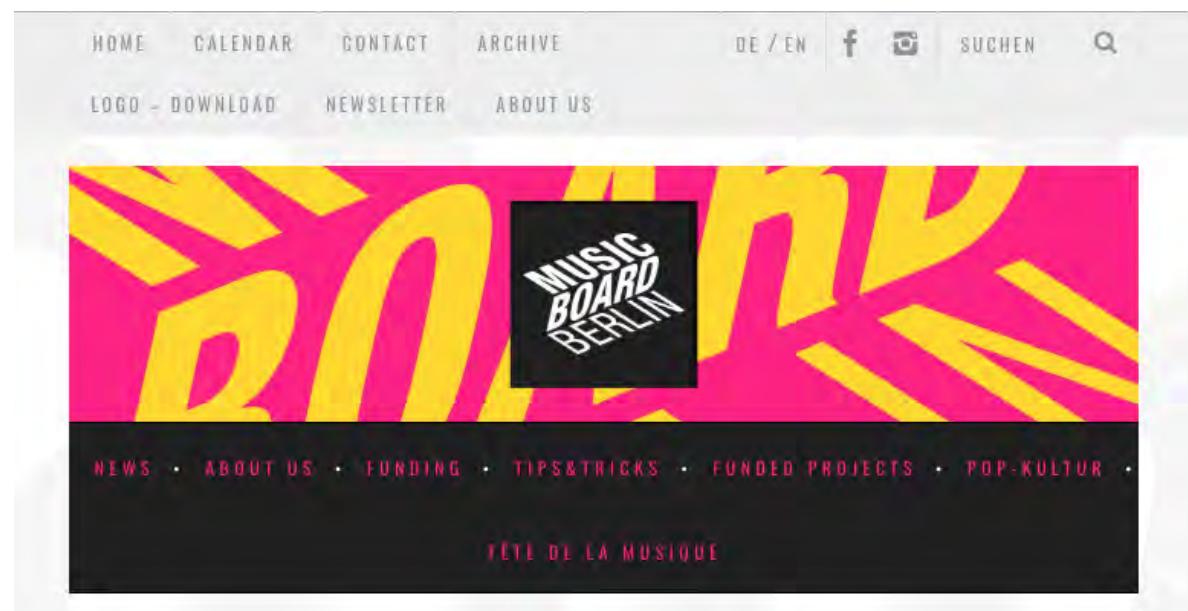


Figure 5. Screen Shot of Musicboard Berlin's Website Header as of 27-8-2018

Career Springboard Berlin and Pop in the Hood funding rounds are twice yearly, Festival Funding and Scholarship and Residencies take place once a year, and Support Funding runs from January–November yearly. Decisions are made by a jury formed of 5 Berlin music industry professionals from a variety of backgrounds. The current jury was appointed in 2018 and will sit on the panel for 3 years. The jury is formed of: a booking and management agent, a radio DJ, journalists and a music and performing arts

⁵¹ Music Board Berlin (2018a)

programmer⁵². The focus of Musicboard Berlin in 2019 will be promoting women in pop culture and strengthening the LGBT and BAME sectors.

- **Career Springboard** – funds projects and programmes aimed at emerging artists
- **Pop in the Hood** – funds projects aimed at live music in local communities
- **Festival Funding** – funds popular music festivals aimed at emerging talent
- **Support funding** – up to €500 per artist/band member towards the costs of touring as a support act of an artist/band. Berlin must be the place of residence/work and the recipient must have the tour and expenses (accommodation, travel, equipment) already calculated⁵³
- **Scholarships and Residencies** – funding for a pop-musician/band to develop a new musical project or skill (album or video production, website design, songwriting). Scholarships last 3-6 months and can be between €5,000-10,000. Financial plans must be submitted to justify the amount requested and money is awarded to people who are unable to complete their work without public funding. Residencies in 2019 are available in America, Brazil, Iran, France, Italy, Sri Lanka, India, and Cuba. The Musicboard has arranged a number of partnerships in order to offer residencies abroad, covering flight costs, accommodation, living expenses and some money towards the project. The residency also includes the provision of networks in the local music scene and support in arranging a showcase.⁵⁴

NEXT STEPS:

4.3 Support music venues, event producers and organisations to improve their company conditions by signposting to helpful organisations

Work with funding organisations, donors and other providers to support music venues, event promoters and other music organisations in improving their conditions. Areas should include; sound transfer management, equipment renewal, access, health and safety improvements, diversity, expansion of audience, creation of new positions and staff training. Help to identify grants to meet a wide range of businesses needs. Support needs to be analysed on a case-by-case basis so applicants can benefit from assistance that might be available.

⁵² Music Board Berlin (2018b)

⁵³ Music Board Berlin (2018c)

⁵⁴ Music Board Berlin (2018d)

BA MUSICA'S OPEN CALL FOR PROJECT FUNDING, BUENOS AIRES (ARGENTINA)

BA MÚSICA⁵⁵ was created by the Government of the City of Buenos Aires to improve the conditions in which live music activities take place in the Argentinian capital. Since 2012, this organisation has provided tools and incentives (including subsidies, tax relief and information sharing) to local musicians and venues.

To be eligible for the support through open call funding, companies, bands or individual musicians must complete a registration process and submit a proposal to obtain a subsidy, tax relief or other type of support. Submissions are accepted annually over two months, after which they are evaluated on an individual basis by a directorate and the Ministry of Culture.

CLUB TR3SC, CATALUNYA⁵⁶

The initiative TR3SC was developed in 2006 as a joint venture of the regional government's Culture and Media Department and the Catalan Corporation of Audiovisual Media. It is a membership-based organisation (currently at 34,000 members) with free and paid plans that provide different access to content and benefits in the network, such as discounts, access to exclusive events and presales, merchandise and its in-house events bulletin and magazine.

The platform benefits the overall cultural ecosystem because it appeals to audiences and cultural producers alike. It provides detailed information on quality programming and accessibility benefits to members, and serves as a promotional channel to encourage cultural consumption in the region. A basic membership costs €34 annually and includes permanent discounts for all advertised events, as well as access to exclusive activities. The club provides a physical card to both paid and free members that can be used to get discounts when booking tickets online or in-person at the participating venues.

⁵⁵ Gobierno de Buenos Aires (2018)

⁵⁶ TR3SC (2018)

FUNDING OF ARTS & CULTURE THROUGH TAX INCOME

In 2015, San Francisco enacted an 8% hotel tax, 2.9% of which is allocated to the city's Arts Commission. In 2016, over \$10m of revenue was distributed to arts and cultural organisations.

Berlin developed a similar measure in 2014. Its City Tax amounts to 5% of hotel room prices and is used as a multi-sector fund for the arts. Projects from both individuals and institutions that correspond to Berlin's own self-image as an "open, creative, history-conscious metropolis" are open to apply, and €1.34m is distributed each year.⁵⁷

SPACES AND PLACES

ALLOCATE SPACES FOR MUSICIANS AND INDUSTRY PROFESSIONALS

RECOMMENDATION 5: INCREASE AFFORDABLE MUSIC SPACES AND PLACES AVAILABLE TO ARTISTS AND MUSIC PROFESSIONALS IN CARDIFF

Initiator: Music Office / Economic Development Department / Property developers and investors

Background: Artists and music professionals, especially at the beginning of their careers, struggle to dedicate the hours needed to perfect their craft and skills, since they mostly complement their income with non-music jobs. 73.2% of survey respondents in the professional group, and those marked as 'Other', work only part-time in the music industry (less than 40 hours/week). Despite there being a range of small and large venues capable of hosting music and cultural events, our data collection and research assessment has determined gaps in the available spaces/venue ladder. Affordability was a particular threat among survey respondents identifying as BAME and non-male individuals. Survey results found that local musicians feel that work/rehearsal spaces are often expensive or unaffordable, and there is a polarisation between respondents who find it easy to network in Cardiff and those who have found it difficult to make connections.

⁵⁷ Berlin Senate Department for Culture and Europe (2017)

Goals:

- Increase the availability of suitable working, rehearsal and performing spaces for professionals in the local music sector
- Allow a place where artists and professionals can meet and collaborate creatively and professionally
- Cluster the music sector to boost economic activity and strengthen the community
- Connect the local music scene with creative and professional opportunities locally, regionally and internationally
- Utilise underused spaces for music activities
- Help music flourish in every area in the city.

PRIORITY ACTIONS:

5.1 Develop a Community Music Hub

To ensure the viability of any music, culture or arts provision, spaces and venues must be affordable and inclusive of the community. A flexible space will drive the viability of the use and will support further investment, long-term job creation and development of skills for local residents. The necessities and capacity of the new music hub and its adjacent venue should be assessed by the Music Office and the Music Board to ensure it is suitable for the needs of the professionals working in the music sector in the city. Ultimately, the centre should act as a professional development hub by providing access to learning, rehearsing, performing and networking opportunities for the music sector. This is particularly important for under-18s and other young musicians, who may find it more challenging to access such spaces, contacts and development opportunities.

The project could be seed funded, owned and operated as a not-for-profit trust. This trust or charity would be tasked to fundraise, build, and then manage Cardiff's music hub. The space could potentially include a venue space to capture income from commercial activity. All profits captured by the venue should be redistributed to the grassroots sector, supporting the creation of new festivals and events, music education, community music projects, artist development and training, recording and management, among other uses.

THE GLAD CAFE, GLASGOW, UK⁵⁸

The Glad Cafe is a Community Interest Company that currently operates as a non-profit cafe. To be considered a Community Interest Company, the cafe must use profits and assets for public good. The Glad Cafe achieves this by supporting the Glad Foundation and Glad Rags Thrift Shop. The income generated is reinvested into the Glad Foundation which provides free music workshops for locals. The Glad Cafe is also Glad Community Choir's HQ.

The cafe features a 120-capacity music venue behind the café space. The venue supports and is supported by independent and DIY promoters and local musicians.

The venue and cafe receive indirect state support. The business has a 10 year lease that was established with a loan from Social Investment Scotland, a Social Enterprise and not-for-profit provider of business loans to the third sector. Other monies for this project come from grant funding from Arts & Business Scotland, a charity and limited company. This company received Scottish government money and support from Creative Scotland. It is also sponsored by Scotrail.

Along with this public funding, the venue greatly depends on in-kind support from the private sector. For example, the PA system and other equipment is loaned to the cafe by local companies SSK and Create48. The main costs for this venue are staff salaries.⁵⁹

TREMPOLINO, NANTES, FRANCE⁶⁰

Trempolino in Nantes is another good example of best practice in this sector. More information on it can be found earlier in this report, in section 2.4, *Strengthen and further develop inter-city collaborations*.

FURTHER ACTIONS:

5.2 Provide a framework to facilitate temporary leases for local music and cultural organisations in non-traditional spaces

Such leases would be available to non-profit and charity organisations, as well as commercial organisations, to provide affordable working spaces for the music ecosystem or spaces for producers to organise music events. To be selected, organisations would need to provide evidence of how their activities will engage with and contribute to the

⁵⁸ <https://www.thegladcafe.co.uk/>

⁵⁹ Behr, Dr. A.(2014)

⁶⁰ Trempolino (2018)

community, as well as justify the ways they enhance the diversity and vibrancy of the local music and cultural scene.

KREATIVE RÄUMEN WIEN, VIENNA⁶¹

Kreative Räumen Wien is the city's office for 'activating vacant spaces', managed directly by the City of Vienna and 3 other agents: a representative of the cultural industries, a representative of the property industry and a legal advisory company. Kreative Räumen acts as an intermediary by connecting relevant city departments with potential users of vacant spaces and property owners, as well as providing any additional legal advisory services required. The consortium has brought over 400 spaces into use since 1999 and signed cooperation agreements with over 100 different owners and property companies⁶².

Kreative Räumen provides vacant spaces in specific urban development areas in Vienna to local companies and professionals in the creative industries as part of the City's strategic promotion of the local cultural and creative sector. Spaces are used for a variety of purposes and timeframes, including as exhibition spaces, offices, performance spaces and artist workshops, which are determined in advance during the mediation of the City with the interested lessee and lessor.

PLANNING, TRANSPORT, PLACEMAKING

RECOMMENDATION 6: MAXIMISE EXISTING PLANNING TOOLS IN CARDIFF TO PROMOTE A 'MUSIC FRIENDLY' CITY

Initiator: Music Office / Planning Department / Highways and Licensing

The solution to many of the issues relating to the development of a thriving Music City lie within the planning process. Cardiff Council's Local Development Plan 2006-2026 (LDP) is the main planning document for Cardiff Council, and outlines the authority's policies for managing development over the aforementioned timeframe.

There is limited reference to specific music-related policies within the LDP, as it is considered a use of building, often with more issues applicable to licensing rather than planning matters. In addition, some positive planning policies can have unforeseen

⁶¹ Kreative Räume Wien (2018)

⁶² Magistrat der Stadt Wien (2018)

consequences for live music operations — for example, street pedestrianisation can make loading and unloading equipment into venues more complicated.

This can be exacerbated when large events take place at the Principality Stadium. Taxi fares and parking fees can also significantly increase the cost of a night out for audiences, which reportedly keeps many from travelling more frequently to the centre for music shows. This is a consequence of the current transport infrastructure in Cardiff which is a weak area when it comes to supporting a growing evening and night-time economy.

The Planning process is key to delivering many of the aspirations within the report, and can also be influential in terms of conditions imposed on operators, or the development of music infrastructure in new areas and buildings in the city. Involving planning at an early stage will help to mitigate future problems and provide guidance on delivering many of the changes recommended within this report.

Goals:

- Facilitate the development of music activity to serve areas of the city and during extended hours
- Anticipate potential disturbances and develop a good relationship between residents and music spaces
- Establish relationships with the planning department to leverage possible opportunities
- Involve the real estate development sector in the creation of a music-friendly city
- Explore placemaking benefits of encouraging music to happen in non-traditional spaces
- Consider a night-time economy strategy to add clarity to future planning decisions
- Ensure Planning representation on the Cardiff Music Board to ensure deliverability of ambitions is considered.

PRIORITY ACTIONS:

6.1 Consistently implement Planning Policy Wales 10 and apply the 'Agent of Change' principle in Cardiff

In December 2018, Planning Policy Wales 10 was adopted by the Welsh Government. This outlines policy guidance for local planning authorities in Wales, and should feed into policies across the country.

The Agent of Change principle is a protective policy, now adopted in Wales, to hold new developments accountable for sound attenuation⁶³. Its implementation in Cardiff should be assessed to better serve the requirements of cultural operators, including sound attenuation measures when a proposed residential development is within 50 metres of existing live music performance venues. Sound exposure and limits should be defined in areas of risk (i.e. city centre) to hold venues accountable for possible infringements, while making new residents and visitors aware of the noise levels in the area.

The 'Agent of Change' should be triggered automatically when a new planning application is lodged, in order to initiate the sound attenuation assessment. Planning Policy Wales contains several specific references to live music, and numerous references to the importance of cultural institutions, of which live music venues or associated infrastructure such as recording studios, undoubtedly form a part.



Principality Stadium. Photo: VisitCardiff

⁶³ Beverly Whitrick, Strategic Director at Music Venue Trust (MVT), reassured Sound Diplomacy that the sector is already working on advocacy and campaigning for ensuring that the 'Agent of Change' protects grassroots music venues. She also pointed out that Jon Fox submitted extensive advice on behalf of MVT to the first draft of the Welsh Government's Noise and Soundscape action plan 2018–2023, where Section 4.3 commits Wales to adopting Agent of Change in a manner that explicitly protects grassroots music venues.

VALLEY SOUND MACHINE, BRISBANE

Brisbane City Council created the Valley Sound Machine⁶⁴, an online tool that gathers samples of expected noise levels from various areas of the Entertainment District. Anyone can listen to two audio samples from an area of their choosing, from two times of day (10am to midnight and midnight to 10am). The user can also customise the samples themselves, with options to add extra sounds from common sources such as traffic, buskers and patrons. Users can also test this decibel level against different types of locations, including on Valley streets and in Valley apartments with different levels of insulation. When the Valley Music Harmony Plan⁶⁵ was first published, the primary concern for venues and noise was not resident complaints, but rather the licensing laws that entailed an alcohol license, which came with stringent noise levels past 10pm.



Screen shot of the Valley Sound Machine online tool

The online tool allows the user to hear and view the average decibel level while adjusting the time, precinct, type of sounds, type of insulation of the apartment, and so forth. Further customisable options include checking the sound levels at night inside a low-insulated apartment. The tool will also suggest better insulation materials to help mitigate, where appropriate, against sound.

While not intended as a definitive measurement, the Valley Sound Machine provides some guidance on expected decibel level for residents or businesses intending to move into the area.

NEXT STEPS:

6.2 Develop a placemaking strategy and masterplan for Castle Quarter which highlights it's unique position within Cardiff's music scene

The Music Office and Music Board should consult the music businesses in the area about the development of a branding and placemaking strategy for Castle Quarter. This could be pitched to Cardiff Council and based along the lines of Manchester's Northern Quarter. A pitch should include an Action Plan outlining its economic, cultural and planning potential. The assessment of such branding should determine which promotional tools and channels would be most suitable (eg social media promotion, printed leaflets, bespoke signage) as well as to prepare for mitigating possible conflicts that may arise, such as a review of the limitations on opening hours.

QUARTIER DES SPECTACLES, MONTRÉAL

The Quartier des Spectacles is downtown Montreal's primary entertainment and arts district. It boasts over 30 performance venues in an area just over 1km², as well as public spaces for over 40 events per year. The district was designed for music and cultural events, with several projectors bringing surrounding infrastructure to life, lamp posts designed for rigging, illuminated walkways and several other urban design features. Although originally intended to support the Montreal International Jazz Festival, it now serves other cultural events. During the summer, the area is pedestrian-only.

The district can host 50,000 people in its various spaces, and organisations can apply to hold events via the Quartier des Spectacles website, which lists each public space alongside their respective specs. Proposed events must be free to the public and must not act as a sales or promotional platform for commercial entities.⁶⁶

6.3 Engage with the local music sector in the new Cardiff Arena development

Cardiff is committed to building the missing piece of the city's music infrastructure, a new 15,000 seater, multi-purpose arena. This new development will attract more International acts to Cardiff and have a positive impact at all levels of the live music ecosystem, from the grassroots venues to our major spaces. The Cardiff Music Office and Music Board will work on ensuring clear channels of communication are established between developers, operators and the existing ecosystem.

⁶⁶ Quartier des spectacles Partnership (2017)

6.4 Work with partners to support improved evening and night time public transport accessibility

Undergo a consultation with the Music Board and transport officials to determine potential new routes for buses and bicycles, and explore revised timetables for public transport. The improvements would be aligned with the existing transport and mobility strategies in place and could potentially be used to promote a responsible night out in Cardiff as part of a promotional campaign. Some of the key opportunities for improvement that have been noted include:

- Install smart lighting in the parks and mark cycle routes through Bute Park
- Assess viability of new bus timetables/routes
- Assess viability of adding later trains to the timetable
- Lobby transport operators to trial later train services on event weekends or for a gig night once a month
- Ensure Music is a consideration as the South Wales Metro system develops.

NIGHT NETWORK TRANSIT, MELBOURNE⁶⁷

Since late 2015, Public Transport Victoria has had a comprehensive Night Network connecting suburbs and regional areas in the Australian province, including 24-hour public transport options on weekends⁶⁸. The night transit scheme has proven to be crucial to the development of its night-time economy by providing safe, easy and cheap transport options. The City of Melbourne's Night Network is designed to provide an all-night train, tram, or bus service within one kilometre of the homes of 70% of Melburnians to encourage its use⁶⁹. Free Tram Zones available in the daytime also apply to late night travel, which helps locals and tourists move around the city's core activities district.

The use of the night transit network is also promoted through the recent Explore the Night campaign which shows how specific Night Network routes connect to Melbourne's nightlife, with a focus on live music activities. The campaign includes outdoor and radio advertising, and other promotional activities, as well as artist-curated Up-Late Playlists that can be accessed by scanning Spotify codes in posters around town. Local musician Ecca Vandal produced its musical single.

⁶⁷ Public Transport Victoria (2018)

⁶⁸ Premier of Victoria (2018)

⁶⁹ Transport for Victoria (2018)

BUILDING AMENDMENT (LIVE MUSIC) REGULATIONS IN AUSTRALIA

The Building Code of Australia (BCA) has a direct impact on live music venue viability, as well as on existing venues providing a live music programme. Under BCA definitions, venues are either classified as Retail Class 6, which groups retail, bars, hotels and restaurants, or Assembly Building Class 9B. If a venue offers live entertainment it is then classed as a 9B (together with buildings such as sports stadiums and airports) and is required to comply with higher safety standards. This is particularly troublesome for smaller venues and those located in older buildings, which are generally more expensive to modernise and bring up to code standard. The extensive building work required for this higher level of compliance can make it impracticable for small venues to host independent small-scale entertainment.⁷⁰

The BCA Classification system was deemed inconsistent, highlighting that there was not a strong evidence for the difference between Class 6 and Class 9B buildings, particularly given improved technological changes to live music performance, and this approach did not accurately reflect the risk (i.e. use, hazard or occupancy)⁷¹. As a solution, the Building Amendment (Live Music) Regulations 2014 were introduced by the Government of Victoria to amend the Building Regulations 2006 in relation to the classification of Small Live Music Venues under the BCA in the State of Victoria. The Regulations were changed to recognise the provision of live music entertainment as an important part of the use of small Class 6 buildings such as hotels, restaurants, cafes and bars (small live music venues), effectively cancelling their automatic classification as Class 9B buildings.⁷²

⁷⁰ Government of Western Australia (2015)

⁷¹ SKIP Consulting Pty Ltd. (2015)

⁷² Victorian Building Authority (2014)

AMSTERDAM'S EXTENDED VENUE CURFEWS⁷³

Amsterdam City Hall has given 24-hour alcohol and operating licenses to 10 venues in the outskirts to relieve pressure on downtown nightlife and tourism. Such venues act now as cultural destinations, while also providing services to the community in the daytime. Venues taking part in the Amsterdam Dance Event also have extended operating hours (closing at 8am instead of 4am), an exception granted in exchange for in-kind contribution from venues, such as street teams.

Longer opening hours have led to staggered dispersal and quieter patronage, rather than club-goers turned out onto the street all at once. Venues and events that receive special licenses are evaluated on an individual basis to ensure that their cultural programming contributes to the attractiveness and diversity of Amsterdam. This requires extensive licensing work but is a long-term solution for the sustainability of tourism as well as the vitality of the city and its nightlife.

BUILDING AFFORDABLE ARTIST STUDIOS THROUGH SECTION 106 AGREEMENTS IN HACKNEY, UK⁷⁴

Section 106 agreements in London are frequently used to secure the delivery of key local infrastructure including schools, affordable homes, public realm enhancement projects or heritage assets, and can also provide for cultural infrastructure. The developer may implement these contributions themselves, or agree to make a payment to the local planning authority, so that delivery of the works is overseen by the council.

Hackney Council's cultural policy identifies how the borough can act as a broker in developments, to ensure that provision is made for affordable appropriate space or as the provider of property. Under the Section 106 agreement, the newly-built mixed-use development of Matchmakers Wharf in Hackney has integrated 49 purpose-built affordable artist studios. The development is by Hackney Wick, an area that has traditionally offered artists' studio space at affordable rents, but which has been coming under pressure due to gentrification. Thus, the new development of market and affordable residential units enables access to the 49 artist studios at lower than market rents on a 999-year lease. The studios were allocated in 2012 with priority given to artists resident in Hackney.

⁷³ Diaz (2017)

⁷⁴ Mayor of London (2015)

EDUCATION

ACCESS TO MUSIC EDUCATION IN ALL LEVELS AND AGES

RECOMMENDATION 7: BUILD PARTNERSHIPS TO ENABLE A COLLABORATIVE PROVISION OF MUSIC EDUCATION IN CARDIFF

Initiator: Music Office / Education Department / Key Music Education Stakeholders

Background: The largest provider for Music Education is Cardiff County and the Vale of Glamorgan Music Service. There are three main strands of provision: Instrumental teaching in schools, Music Development projects and Ensemble activities. Over 90% of Cardiff schools give pupils the opportunity to learn an instrument. 87% of this work is delivered by Cardiff Council and the Vale of Glamorgan Music Service, with about 100 staff employed to teach.

The Assisted Instrument scheme enables parents to purchase affordable instruments at reduced cost, and, where there is need, instruments are loaned to pupils who may not be able to afford them. Schools can use the Pupil Deprivation Grant to fund pupils on free school meals. In areas of high deprivation, the Service facilitates Music Development projects, which support inclusive and diverse provision. The Music Service also runs 20 ensembles ranging from orchestras and brass bands to guitar groups and choirs. These ensembles provide over 600 pupils with the opportunity to make music together. Many of these pupils go on to perform with National Youth Arts Wales, in the national ensembles.

Music in the school curriculum is represented in Cardiff by 13 High Schools and 2 post-16 settings offering GCSE courses. In addition, BTEC diplomas in Music/performing arts are on offer in 9 schools, with 2 offering A/AS level courses. Cardiff Council's Youth Service run 5 recording studios, and a partnership with 'The Ministry of Life', which provides a level 2 course in Music Industry Skills. Cardiff and Vale College supports this course, and runs level 3, 4 and 5 music and music tech courses covering all aspects of the Music Industry. Grassroots Studio is another Youth Service initiative aimed at the most vulnerable 16-25 year olds to develop their skills and work towards accreditation. At a degree level, Courses in Classical Music at RWCMD and Cardiff University and Rock and Pop music at the Atrium (University of South Wales) are available. Adult and Community Education provides recreational courses for those engaged in lifelong learning.

This is a wide ranging and well developed music education plan, and in light of the information above, survey respondents demonstrated an overall positive opinion of it, scoring it an average of 3.2 out of 5. However, the availability of high quality music industry education was rated poorly, and whilst instrument learning programmes and group

support are indeed available across Cardiff, there are very limited options for individuals to access training that is linked to industry-demanded skills, whether it's an introduction course to music production/mixing software such as Ableton; playing a particular instrument; or beginning a traineeship in a recording studio. In fact, about 56% of artists and 42% of professionals surveyed are self-trained in both the music and music industry fields, while only about 20% studied music-related topics at university.

Music educators are common roles in the music ecosystem, and those who work in the field appear to be the top-earners in the analysed ecosystem sample – 50% of these respondents earn £35,000-50,000.

Goals:

- Promote the benefits of music education among schoolchildren and young people
- Ensure there are clear access routes for all, whether they wish to learn, participate or perform in the many roles offered by the music industry
- Provide extracurricular opportunities to develop the skills and knowledge related to professions and roles in the music industry from an early stage, with increased opportunities for young people to participate in Cardiff's musical life
- Retain and develop high quality teachers, facilitators and performers.

PRIORITY ACTIONS:

7.1 Create a Map of Musical Opportunities and the relevant pathways to inform participants on how best to plan their musical journey

Whilst there is a lot of music education activity going on in Cardiff, it is difficult for those working within it to see the full picture, as many providers are working in isolation. The music education partnership should gather information, once this has been completed, prepare a menu of opportunities and a map of provision, explaining appropriate pathways to assist participants to achieve their musical goals. There should be an online resource for pupils and parents, putting these opportunities all in one place to disseminate across schools, so that teachers are aware of next steps available to their pupils. This work should also be linked with real life experiences and potential employment using established education-business partnerships in Cardiff, as well as mentorship opportunities, industry awareness open days, and other ways to inform secondary school career advisers on opportunities in the music industry, so that students are engaged to pursue music tertiary studies and traineeships in Cardiff.

7.2 Develop a vision for a Universal Music Education Offer for all Young people in Cardiff

Bring together the key stakeholders for music education in Cardiff to create a music education partnership. This group should construct a vision for music education for the city, informed by sharing the best of what is currently on offer and how to enhance and develop this further. This vision should be clearly articulated and ambitious in its scope.

NEXT STEPS:

7.3 Introduce music workshops aimed at primary and secondary school students

Music workshops for young students are an excellent and informal way to introduce children to the diverse world of music, to provide a community of music students, and a good way to invest in much-needed music education in Cardiff. These should be in connection with the current National Assembly for Wales campaign to make instrumental classes free for all children, highlighting the importance of equality in access to music. Music workshops allow students to experiment with a variety of music genres and to try out a variety of new instruments. Singing can be encouraged to develop ear training, as can an introduction to music theory concepts, and musical notation.

It is worth noting, that part of this could be included in ACW's Lead Creative Schools Scheme⁷⁵, which aims to promote new ways of working in schools, providing the opportunity to develop an innovative and bespoke programme of learning designed to improve the quality of teaching and learning.

⁷⁵ Arts Council of Wales (2018)



Tiny Rebel Cardiff. Photo: Kacie Morgan – therarewelshbit.com

SOUND THINKING NYC

This programme is offered from the City University of New York and Creative Arts Team initiative. In general, it provides multiple levels of student commitments all focused on increasing opportunities in the music industry for underrepresented groups, particularly women. During the programme, students are given the chance to visit recording studios, learn about sound design, and network. Participants must be New York City students entering the 11th grade and be accepted via a competitive application process.

The initial programme consists of a 3-week Summer Intensive. All graduates of this phase are given opportunities to participate in industry-related events during their 11th and 12th grades, apply for designated paid summer internships, and apply to free college credit courses during their final year of high school. During the programme, participants receive free metrocards for the three-week period and lunches. All expenses are covered by the Mayor's Office for Media and Entertainment (MOME)⁷⁶.

⁷⁶ Ibid.

ARTIST DEVELOPMENT

PROVIDE ARTIST DEVELOPMENT OPPORTUNITIES FOR LOCAL ARTISTS

RECOMMENDATION 8: CHAMPION ACCESS TO ARTIST DEVELOPMENT OPPORTUNITIES IN CARDIFF REGARDLESS OF AGE, SKILLS LEVEL AND GENRES OF WORK

Initiator: Music Office / Economic Development Department

Background: Overall, critical challenges within the ecosystem are mostly to do with bureaucracy and the availability of support for talent development: performance fees, regulation, funding support and support from media, labels and managers. Artist survey respondents ranked performance fees as the worst asset of Cardiff's music ecosystem, with BAME respondents' ratings even lower than the total average. The majority of artist respondents (71%) work 20 hours or less, with a majority (87.2%) reporting earnings of less than £10,000 from music sources alone per year. Although precarious in salaries, the local scene is vibrant; 'local talent' is the best-rated asset in the ecosystem, and a majority of artist respondents played at least one show in Cardiff (83%) last year. It has also been noted among audiences there is a certain homogeneity in the acts being booked – mostly in rock/indie – and more diversity of genres in the local scene would be appreciated.

Goals:

- Promote fair remuneration for artists and a sustainable job economy in the local ecosystem
- Increase access to performing opportunities for artists in all their artistic development stages
- Allow for more development opportunities by artists working in a diversity of music genres
- Create and grow a Cardiff Signature event that nurtures home grown talent.

PRIORITY ACTIONS:

8.1 Create a 'Fair Play' charter of ethics and certificate for venues

The Music Office, in collaboration with the Music Board, should work with Musicians' Union and partners to deliver their 'Fair Play' scheme and principles that support local artists, promoters and venues to create fairer deals that help the creatives and the music ecosystem at large. While it would not be a mandatory requirement, it would be more encouraging if organisations such as venues, festivals and promoters eligible to receive

local or provincial grants would need to provide proof of complying with this 'Fair Play' standard, including not having pay-to-play bookings and covering diversity quotas in their programme. This status should be assessed periodically to ensure venues are still compliant and adapting to new booking requirements and standards. Venues with a 'Fair Play' certificate would be able to promote themselves as such in promotional materials, including priority space in Cardiff-led Music City marketing and communication actions.

THE MUSICIANS' UNION'S FAIR PLAY VENUE SCHEME⁷⁷

The Musicians' Union advocates and promotes activism against unfair treatment of musicians in the UK. Its advocacy led in 2015 to the Fair Play venue scheme, which aims to "recognise good practice and stamp out the unfair treatment of musicians"⁷⁸.

The guide⁷⁹ contains advice for self-promoting artists in areas such as fair co-promotion deals, participating in competitions and showcase events, and submitting applications to perform at festivals. Musicians can submit their positive experiences at venues to get the owners involved in the Fair Play scheme, and after evaluation the venues can include a sticker to display as the badge of their respect for artists.

8.2 Create a platform for performance development

Artist showcases and 'Battle of the Bands' type events serve a multitude of purposes. They provide artists an opportunity to hone their public presentation with the added challenge of attentive audiences or competitive lineups. They also act as a marketing device, showcasing the best homegrown talent Cardiff has to offer and allowing artists to perform to audiences who may have originally come to see someone else play.

For competitions which award prizes for best performances, this is an opportunity for artists development in itself. Organisers can work alongside local recording studios and other stakeholders to provide studio time, new artist and band shots, instruments/gear or even a gig at subsequent event, such as a festival slot or support slot for a touring act. While artist showcases may not have a competitive element, those selected for the event could receive coaching as part of their participation, advising them on the marketing and business skills needed for artists looking to build their careers. It is worth noting that the council already runs an annual event called The Big Gig that works in some of these areas. However, the event would benefit from taking on some of the recommendations here.

⁷⁷ Musicians' Union (2015b)

⁷⁸ Ibid.

⁷⁹ Musicians' Union (2018)

FReeZA PUSH START BATTLE OF THE BANDS

To highlight local talent diversity, the regional Government of Victoria funds the FReeZA Push Start Battle of the Bands, that awards monetary and in-kind prizes and festival performing slots to finalists.⁸⁰ This showcase is open to any style of music, including bands, soloists, hip hop artists, electronic and acoustic acts, and so forth. Young event organisers and promoters also participate through local committees and Youth Councils that host FReeZA Push Start. Whilst this event does not attract large audiences, the performing value for young bands is noted by the participants.

"We've watched over 300 talented artists participate in the competition via their local FReeZA group over the past 12 months and it's really encouraging to see such impressive songwriting and performances from the nine artists who have progressed to the final." — Shane Wickens, Push's Artistic Director

NEXT STEPS:

8.3 Create a cross-genre international artist showcase and signature event

An artist showcase event is a great opportunity to market Cardiff as a city filled with talent, whilst providing artists a platform with which to build international recognition. This could begin with a cultural exchange, as suggested in Recommendation 2.4, utilizing sister city relationships to send Welsh musicians to Stuttgart and Nantes, and vice versa. Over time, the programme could progress to include presentations at festivals such as South by Southwest or The Great Escape. A showcase setting gives artists and their teams the chance to build fan bases and make business connections, and is an excellent opportunity for acts who have reached local headline status and are looking for the next step in their careers.

It is important that potential lineups to a showcase event are carefully chosen to represent the diversity of music Cardiff has to offer. The city should explore the development of a music based signature event, that creates a platform to nurture home grown talent on a shared stage with established musicians.

The British Council Wales recently published their International Showcasing Strategy for the Arts of Wales⁸¹. The report's findings and recommendations would seem to strongly

⁸⁰ Beat (2016)

⁸¹ https://wales.britishcouncil.org/sites/default/files/international_showcasing_strategy_final-111018_v2.pdf

encourage the creation of an artist showcase. We would suggest developing city based showcasing platforms associated with Cardiff music events and festivals.

CANADIAN BLAST

CIMA is the not-for-profit national trade association representing the English-language, Canadian-owned sector of the music industry. CIMA's membership consists of Canadian-owned companies and representatives of Canadian-owned companies involved in every aspect of the music, sound recording and music-related industries. The experience gained over its 40 years of existence has allowed the organization to effectively use its resources, such as by investing in research and market development on key territories. CIMA develops member-specific activities such as Canadian Blast, the initiative for showcase and B2B events including presentations at international festivals, conferences, trade fairs and independent trade missions. The program focuses on the US, Europe, Asia and Australia as key territories, providing marketing and promotional opportunities for artists and businesses they could not otherwise gain access to. Depending on the market, Canadian Blast participation can be organised by providing a stand during a trade fair, staging a showcase during a festival, organising speed networking or mixing sessions for professionals, providing PR on specialized media and so forth.



Image courtesy Clwb Ifor Bach

PROFESSIONAL DEVELOPMENT

PROVIDE PROFESSIONAL DEVELOPMENT OPPORTUNITIES FOR THE LOCAL SECTOR

RECOMMENDATION 9: SUPPORT INDUSTRY PROFESSIONALS TO DEVELOP THEIR CAREER, NETWORK AND SKILLS IN CARDIFF

Initiator: Music Office / Economic Development Department

Background: Formal training in the music business is still underdeveloped in Cardiff and what is available is not sufficiently promoted. Arts Council of Wales continues to be a major supporter of professional development opportunities for artists and organisations through its funding programmes, particularly those involved in partnerships with UK organisations such as the BBC or PRS Foundation, as well as the associated Portfolio organisations that reach out to musicians and audiences. However, less than 19% of survey respondents have participated in local music education or music industry education workshops. The Welsh Music Foundation's directory of music businesses and the workshops it organised are quoted as being 'much missed' by artists and professionals in Cardiff, and the sector is still lacking a platform for networking and developing new business relationships. There is an opportunity to help Business to Business and Consumer to Business music services, as the music industry is heavily profit-driven in Cardiff. In fact, 62% of surveyed organizations have a for-profit status, music activities represent 91-100% of total revenue for most music organizations surveyed and only 10% of the total revenue in surveyed organizations derives from work with local artists. These statistics point to various areas of professional development that would be beneficial to local businesses.

Goals:

- Develop skill training and networking opportunities on the local level
- Connect local industry professionals at all stages of their careers with UK and international experts, to grow their practical knowledge and development capacity
- Promote access to funding and mentoring opportunities for professionals and businesses struggling to move to the next level
- Grow a sense of community among professionals in the local sector
- Encourage and promote workplace learning opportunities
- Encourage employers to support employees in higher education through allocated study time, and monitoring capacity within the workplace.

PRIORITY ACTIONS:

9.1 Organise music business workshops and conferences in partnership with UK organisations and professionals

In partnership with local and national organisations, the themes for the workshops, consulting sessions and conferences would be identified by running surveys, circulating enquiry forms, or identifying urgent needs through other qualitative means. A programme calendar should be drawn up to deliver the workshops. It was highlighted during the consultation that local promoters have shown an interest in and would benefit from such a programme, targeting skills such as business management and marketing/PR.

As a suggestion, the Music Office should also coordinate access to introductory courses for other council departments to better understand the music industry and live music sector and its idiosyncrasies, perhaps by inviting local stakeholders in the music industry to come and give a talk or a presentation to the council itself.



On Record, Cardiff Contemporary Festival. Photo: Noel Dacey

SYNTHESIZER, TEL AVIV

Synthesizer is an accelerator for musicians built on the traditional business accelerator model. This agency is a non-profit which subsidises almost all of the selected artists' tuition costs through private donations (the chosen artists only have to pay \$300 out of their own pocket).

The organisation selects 12 artists and uses open community spaces for its workshops and mentor meetings. The programme lasts 12 weeks and requires artists to participate fully. Synthesizer offers lectures, professional consultations, personal mentors and workshops covering bureaucratic, managerial and artistic aspects.

In return, and as practice for live performance, Synthesizer participants give free public concerts each month. For the programme's final production artists perform in two showcases hosted in the Bascula arts centre.

The courses offered during the 12 weeks include:

1. The Musician as a Business
2. Defining Your Independent Identity
3. Production Fundamentals and Show Strategy
4. The Secrets of Booking
5. Traditional Media, PR, and Industry Norms
6. Digital Presence and Social Media
7. Community, Networking and Groundwork
8. Legal Rights, Distribution, Royalties, and Sync
9. The Big World: International Careers
10. Time, Team and Resource Management
11. Tips, Ideas and Inspiration
12. Live Sessions and Showcase

To be selected, artists must be unsigned, own or have copies of their recorded materials, and performed in at least one live show.⁸²

⁸² Synthesizer (2018)

NEXT STEPS:

9.2 Assess the creation of a Cardiff music business incubation programme

The development of new ideas, products and services in the music industry is being stymied by difficulties in accessing appropriate mentoring, R&D and funding resources. This is particularly true in the case of music start-ups, but also resonates for the majority of the self-employed creative workforce in Cardiff, including musicians. To assist them, a Cardiff music business incubation programme could be tested as an online portfolio and mentorship scheme, evolving into a permanent location after assessing its effectiveness and viability. Businesses should be encouraged to cater to, or work in conjunction with Cardiff's music ecosystem. This initiative could potentially be delivered in partnership with the Enterprise Zone Wales scheme (Central Cardiff).

NASHVILLE ENTREPRENEUR CENTER'S PROJECT MUSIC PORTFOLIO⁸³

The City of Nashville has grown its credibility and reputation as a Music City over the decades, but it has been in the recent years that it is targeting the growth of its tech sector to develop a strong music tech sector. One of its initiatives in this area has been the Project Music Accelerator, developed by the Nashville Entrepreneur Center. It began in 2015 and evolved into the Project Music Portfolio, supported by the Country Music Association (CMA). The Center also has an Entrepreneur-in-Residence to work hand-in-hand with participants as they validate and mature their businesses⁸⁴.

This year's programme brings music, tech and business leaders together to nurture 13 growth-oriented startups in the music industry. It is intentionally focussed on developing innovation through 'connections, curriculum & community' tailored to each entrepreneur's needs. Although participants do not need to be based in Nashville, the programme involves at least 4 curated events over the course of the year and provides access and connections to advisors and music industry leaders, in exchange for an annual fee of US\$3,900 per year, per company.

⁸³ Project Music Portfolio (2018)

⁸⁴ Project Music Portfolio (2017)

AUDIENCE ENGAGEMENT

RECOMMENDATION 10: EXPAND MUSIC ACTIVITIES IN CARDIFF

Initiator: Music Office / Economic Development Department

Background: Qualitative evidence taken from our survey suggests that live music plays an important role in the daily life of Cardiff's population, with 75% respondents saying they attend a music event once a month or more often. On top of this, it is the scene made up of local, emerging artists that appears to be the most strongly supported, with only 4% of respondents claiming not to be interested in this type of gig.

With traditional, night time venues being the most common way of putting on gigs in Cardiff, affordability of tickets and the lack of night time transport options post-gig are cited as major obstacles to attending more concerts.

The potential regeneration of St David's Hall also presents an excellent opportunity to develop new audiences and expand the number of regular concert goers in the city.⁸⁵

Goals:

- Bring together Cardiff's communities through music activities and increase social cohesion
- Build and promote Cardiff as a Music City from the ground up by engaging the grassroots industry and audience sectors
- Promote access to music audiences from a wider diversity of backgrounds
- Increase the number of paid gigs and audience exposure for local musicians
- Provide skill development opportunities to young/inexperienced promoters.

PRIORITY ACTIONS:

10.1 Advocate for increased daytime and community music programming

The UK's Live Music Act allows for music programming to happen outside of traditional music venues. Under this law, most small spaces can put on acoustic or amplified performances, such as museums and galleries, workplaces and schools, churches, and community halls. However, the limitations found in Cardiff's current licensing laws and the current policing of licensed venues and open-air music events, may have created the erroneous perception that music can only happen at night. The Music Officer and Cardiff

⁸⁵ More on St David's Hall in section 10.3 of this report.

Music Board should work together to inform community groups, business organisations and other collectives that increased music programming in alternative settings and hours is not only legal, but encouraged.

A good starting point would be to create a pamphlet listing the minimum legal and technical requirements to book a performer (in terms of licensing requirements as a venue and PA/backline commonly required by artists), as well as a set of best practice examples such as fair remuneration and how to promote an event. The pamphlet could be distributed amongst existing venues and integrated into a larger resource manual for new business owners applying for a license. Cardiff would benefit from an increased variety of daytime, afternoon and evening music activities available to all ages and communities, which would in turn promote its status as a Music City. The UK Government's guide to organising a voluntary event⁸⁶, Attitude is Everything's Access Starts Online⁸⁷ and DIY Access Guide⁸⁸, and Making Music's Events Accessibility Checklist⁸⁹ all provide useful examples of how such a pamphlet might take shape.

BEST PRACTICE GUIDE FOR VENUES, VICTORIA (AUSTRALIA)

Music Victoria and its Live Music Roundtable developed a document with Best Practice Guidelines for live music venues⁹⁰. The guide addresses positive examples in the key areas and issues that may be related to operating a music venue, from sound management and booking to venue security and safety, and includes examples of contracts and agreements as appendices. Throughout the report, laws and regulations applying in Victoria are mentioned alongside best practice approaches as well as links to other organisations supporting the live music ecosystem in key areas including transport, youth, sexual harassment, health and safety, artist associations and so forth.

10.2 Create a gig listing platform online that is inclusive and representative of the wider music offer in Cardiff

Music is not currently featured on the landing page of VisitCardiff.com, and it is not easy for visitors to find information on music events or music heritage on the website. An open-source supervised listing platform should be featured on VisitCardiff.com and/or

⁸⁶ UK Government (2017)

⁸⁷ Attitude is Everything (2018a)

⁸⁸ Attitude is Everything (2018b)

⁸⁹ Making Music (2015)

⁹⁰ Music Victoria (2016)

developed as a separate website to reinforce the importance of music to the city and its tourism sector.

Partnerships with local media and journalists should be leveraged to create a city-wide gig listing platform that is truly diverse and inclusive. It should feature events of all sizes and genres and not only focus on larger events or certain trends. The website can also include a highlights section featuring certain areas, shows and venues that can raise advertising revenue to cover website maintenance costs.

SANTIAGO WEEK, SANTIAGO DE CHILE

Santiago Week is an online and printed calendar of all events happening in Santiago de Chile created by PortalDisc, the largest Chilean music distribution platform, with the motto "Every week, Santiago is a big festival".

Every Monday, a poster is released with the line-up of all artists performing across the capital, which is distributed through partner organisations, the official website of Santiago Week (www.santiagoweek.cl), their social networks and e-mail newsletter.

Artists, promoters and venues can upload directly their events, which are reviewed by the Santiago Week staff and incorporated into the relevant week's poster and programme.



NEXT STEPS:

10.3 Re-establishing St David's Hall as a world class concert hall

Evidence presented throughout the music sector suggests that significant investment is needed in St David's Hall. This would entail renovating and refurbishing the hall and building, with the objective of working towards making the concert hall self-sustaining to

secure its future. While encouraging steps have been taken in this direction, St David's Hall must continue to strive for diversity and excellence when planning its programming in order to attract new audiences and business. Evidence suggests that the marketplace for classical music in Cardiff is reaching saturation point. More must be done to encourage new content, and most importantly, new audiences, to these events. A full refurb of St David's Hall, perhaps by reinstating a restaurant, cafe or visual arts space to its current set-up, could provide the catalyst to explore new ideas, and promote it as a key asset in Cardiff's music scene – and an important tourist destination. Cardiff has the infrastructure and talent base to become an international leading city for classical music and a revitalized, re-energized National Concert Hall of Wales should be at the heart of this.

It was anecdotally noted at various times during the qualitative research, that St David's Hall is considered to be an established part of Cardiff's musical heritage, and not part of the national heritage. A change in branding to emphasize the original 'National Concert Hall of Wales' name might help Welsh Government and ACW support it as a national entity and an asset to the whole country's music profile, not just the Capital City's.



St David's Hall. Image courtesy St David's Hall

THE PARIS PHILHARMONIE

Completed in January 2015, the Philharmonie is a cultural institution in Paris, France, composed of concert halls, exhibition spaces, rehearsal rooms, educational services, restaurant and bars, including a 2,400-seat symphonic concert hall. The cost of construction was €386 million and was shared by the national government (45%), the Ville de Paris (45%), and the Région Île-de-France (10%). The new Paris Philharmonie has been successful in attracting new audience members from all over Paris due to its location in the east and for its diverse programme, which does not focus solely on Western classical music.⁹¹

Beyond its role as a venue, the theatre has social implications. Its physical location symbolises a sort of social barrier as it straddles the Haussmann boulevards: cultural institutions and wealthy urbanites from the poorer, multicultural suburbs. In efforts to create a more integrated city, there is a new tram line that goes into the suburbs and connects them to once-elusive realms such as the Philharmonie. This physical access is coupled by a pricing policy which sees music events typically charging a flat fee of €12 for adults, €8 for children. This is made possible by the theatre's public subsidies.

Furthermore, this new theatre breaks down barriers using genre and music education. Prior to its construction, French culture was dominated by classical themes which were typically linked to the upper class. The brochure for the opening season of the venue expressed a desire to destroy these barriers, increase education programmes, and bring more diverse programming to the people. While the majority of programming will still be classical, efforts to create a more vibrant character of the theatre will see specially-themed weekends such as New York, David Bowie, science fiction, the human voice, amateur music, etc.⁹²

⁹¹ The New York Times (2014)

⁹² Moore (2014)

MUSIC MARKETING

MUSIC CITY BRAND BUILDING

RECOMMENDATION 11: BRING MUSIC STAKEHOLDERS TOGETHER TO BUILD THE CARDIFF MUSIC CITY BRAND

Initiator: Music Office / Cardiff Music Board / Tourism Department

Background: Cardiff does not currently have music branding distinct from "The Land of Song" tagline associated with Wales. Local music events are highly regarded by local and visiting audiences, who rated safety as the best asset in the survey of Cardiff's music ecosystem. Currently, the scene primarily focuses on the classical, indie and rock genres. Local talent, local music professionals and audiences want to see a greater variety of national and international artist bookings, especially in the modern contemporary and electronic music scenes. The proximity to Bristol and its vibrant music scene is challenging to Cardiff's music businesses, with the loss of national tours and underage gigs to Bristol being the two most common causes of loss of business.

Goals:

- Work with the tourism and private sectors to deliver a unified approach to music tourism and include residents in the planning process
- Build on existing local and regional assets to create a music tourism brand and marketing strategy
- Effectively promote the brand of Cardiff as a music-friendly city to residents and visitors
- Support the development of events at local grassroots level, and amongst underground scenes outside the traditional music industry patterns
- Increase demand for and attendance of live music in Cardiff across a variety of genres
- Acknowledge, protect and promote the role of music venues in Cardiff's music history and their impact on the city.

PRIORITY ACTIONS:

11.1 Define the roles of Visit Cardiff, the Music Office and other stakeholders in the promotion of the city through music

The development of a music tourism strategy would attract more investment in and recognition of Cardiff's ambition to be a Music City. In partnership with the Cardiff Music

Board, Visit Cardiff and the Tourism team, business organisations such as FOR Cardiff, relevant tourism organisations, including the hotel sector, and city tourism ambassadors, a series of initial roundtables should assess this process to align goals, discuss expectations and see how collaborations can be taken further. This joint approach from the outset would maximise opportunities from the private and public sectors to determine how best to market the city's music and musical heritage offerings.

Case studies on the music tourism/Music City branding strategies for the cities of Hamburg, Germany; Austin, USA; and Aarhus, Denmark are attached as examples in Appendix 2.

'Q-POP': A TOURISM AMBASSADOR CAMPAIGN FOR QUEENSLAND, AUSTRALIA

The 20th anniversary of Tourism and Events Queensland's "in-market presence" in Korea during 2015-2016 saw a new 6-month promotional campaign titled Q-Pop, involving K-Pop superstar Rain. The Q-Pop campaign featured Rain travelling the state as a "Queensland ambassador" supported by PR activity, social media activation, travel packages and flights to Brisbane. As part of it, Rain also shot a music video for his latest single, showcasing Brisbane's best attractions.⁹³

The resultant social media coverage involving the recording and promotion of the video led to almost 20,000 direct bookings directly tracked to the Q-Pop strategy by the designated 16 travel agent partners. The Q-Pop campaign was estimated to cost about AU\$350,000, and it capitalised on the growing importance of the Korean tourist market for Queensland through the campaign, which assisted in almost 70,000 Koreans experiencing Queensland between 2015 and 2016.⁹⁴

The successful campaign was a partnership led by Tourism and Events Queensland (TEQ) with Korean Air, Tourism Australia, Brisbane Airport Corporation, Brisbane Marketing, Gold Coast Tourism and Tourism Tropical North Queensland.

NEXT STEPS:

11.2 Ally strategically with international platforms and tastemakers to promote Cardiff's alternative and underground scenes

Organisations such as Sofar Sounds, Mixmag, Cercle and London-based DICE are currently promote emerging artists artists from cities around the globe to the rest of the world online. Boiler Room is one of the most popular platforms for the promotion of

⁹³ Atfield (2016)

⁹⁴ Ibid.

underground hip-hop, electronic music and emerging DJs that has not yet been in Cardiff. In this context, there is great potential to increase Cardiff's music promotion channels through strategic alliances between the Music Office, local promoters and these existing platforms. These promotional events could be developed as part of exclusive announcements such as an album or single release, paid sponsorships, or as a tie-in event with an existing festival in Cardiff.

DISCOVERING #URBANANA, ALTERNATIVE TOURISM IN NORTH RHINE-WESTPHALIA⁹⁵

A banana-shaped region is the central point of this tourism branding for the region of North Rhine-Westphalia, joining cities from Cologne, Düsseldorf and the Ruhr to create a fictional metropolis of 10 million inhabitants. Named with the hashtag #Urbanana after its characteristic shape and urban focus of the campaign, the branding developed by NRW Tourism focuses on "undiscovered spaces" worth visiting that are beyond regional well-known tourist attractions, promoting the regional creative industries, events and design. Its website highlights different music traditions and trends in the region in the section The Sound of #Urbanana⁹⁶, in particular its place in the popular music industry.

The Sound of Urbanana focuses on 3 urban centres: Cologne, Düsseldorf and the Ruhr Area. Each has a micro-site featuring extensive sections on the music scene of the different cities, including: Travelogue, a site with interviews and articles, embedded music videos and playlists; Proximity Search, an interactive map of the music venues and spaces in the city; and Pop-Trail, itineraries of themed self-guided walking tours.

MUSIC TOURISM ACTIVITIES

RECOMMENDATION 12: CREATE A CARDIFF 'MUSIC CITY' TOURISM MARKETING STRATEGY

Initiator: Music Office, Culture Department / Tourism Department

Background: Although music venues and festivals generate a roughly equal proportion of the music tourism turnover in Wales, the surveyed sample of the local festival audience has a higher composition of international attendees. Survey results showed that, despite the unsurprising importance given to digital channels and social media, word of mouth is the most frequent promotional option, with over 45% of respondents resorting to it. Non-digital tools are also relevant and used by 31% of the interviewees. Survey results show that

⁹⁵ Discovering Urbanana (2018)

⁹⁶ NRW Tourism (2018)

concert-goers are mainly from Cardiff or from surrounding towns/cities, with only three venues being aware of the presence of international customers.

Overall, music is not incorporated as a key offering for tourists in Cardiff's official tourism promotion materials, while local concerts get promoted mainly by word of mouth.

Goals:

- Promote the city through music and encourage more visitors to notable spaces and areas of music activity in Cardiff
- Develop partnerships with regional, national and international organisations to promote Cardiff as a top tourist destination for music
- Identify and promote a variety of significant music elements in Cardiff's music ecosystem including events, artists, venues and historic facts
- Have a strategic overview of programming across the whole of the music sector, including popular and classical music programming
- Embrace artistic diversity and increase the variety of music genres programmed in Cardiff
- Attract a wider audience demographic to music events, including families, students and older people
- Leverage opportunities from programmed events at the stadium through a coordinated plan involving transport infrastructure and parking, busking and small venues.

PRIORITY ACTIONS:

12.1 Create a Cardiff 'Music City' communication plan for both online and offline strategy

Cardiff should create a narrative around its music and music heritage assets it can sell to locals and visitors. It can do this by developing a music tourism communication plan. This plan should be developed in consultation with industry stakeholders and the hotel sector to ensure room rates are not raised significantly on key calendar dates. Once developed, all tourism information material should include music listing information and event calendars. Staff at tourism information desks should have Cardiff music facts and other useful information, including venue maps and ticket purchase options. The availability of local music for purchase on physical devices (vinyl, USB sticks and other merchandise) at selected tourist information points, and dedicated playlists at online platforms would reinforce the impact of this.

Case studies on the music tourism communication strategies for the cities of Hamburg, Germany; Austin, USA; and Aarhus, Denmark, are attached as examples in Appendix 1.

DISCOVER PUERTO RICO'S SALSA AND MUSIC TOURISM PROMOTION

The Puerto Rico Tourism Company (CTPR) is the government-owned organisation in charge of tourism matters and regulations in Puerto Rico. It also promotes music tourism through the portal DiscoverPuertoRico.com (currently being redesigned and rebranded as SeePuertoRico.com). A specific section for nightlife highlights the entertainment options available on the island⁹⁷, including salsa clubs and bars/clubs with music, and features an integrated social media feed incorporating photos by people who have tagged nightlife locations in Puerto Rico.

The website also promotes a music tourism product developed by the CTPR, La Ruta de la Salsa (The Salsa Route), a tour through places and spaces in Puerto Rico that have played a significant role in the evolution of salsa. The Ruta de la Salsa can be self-organised by tourists through the locations and information provided on the website⁹⁸, but the page also includes links to dance clubs, informative videos and guided tours available for booking.

See Puerto Rico's Facebook⁹⁹ page has over 1,013,500 fans as of August 2018, and represents another key platform for CTPR's promotion using music. World-famous singer Luis Fonsi is an official tourism ambassador for Puerto Rico, for which CTPR has developed video campaigns and tourism marketing materials using the singer's hit Despacito, and images of him. Materials include video advertising, Facebook cover images, sponsored posts on the singer's social media, and social media features.

NEXT STEPS:

12.2 Create options to engage with music tourists before and after their arrival

Music should be an intrinsic part of Cardiff visitors' experience when planning their visit and upon arrival. The Music Officer should work with the Council to integrate music 'made in Cardiff' in city attractions as part of the soundscape, through allocated kiosks or busking spaces, as well as public speakers and advertisement spaces. Cardiff Central Station could welcome passersby and commuters through a bespoke strategy, including

⁹⁷ Discover Puerto Rico (2018a)

⁹⁸ Discover Puerto Rico (2018b)

⁹⁹ SeePuerto Rico (2018)

tablets with information about music activities, a places of interest map, and notes on Cardiff's music heritage. Locally-recorded electronic and classical music can also be suitable for licensing as background music for key tourist areas.

UNCOMMON PEOPLE, SHEFFIELD

The project (uncommonpeople.co.uk) was created by the University of Sheffield and Sensoria Festival to launch a new innovative map of Sheffield's musical heritage.

Uncommon People is an online celebration of the wealth of musical talent in Sheffield. It is a kind of 'family tree' that is regularly updated in an ongoing attempt to capture the sheer breadth and depth of musical activity that goes on in the city. The website offers the possibility to explore the city's rich musical heritage and discover its thriving current scene, as well as inviting users to contribute with stories, anecdotes, footage, photos and music clips. It has a map of locations and venues, a timeline and a family tree, and the ultimate goal of the project is to connect the city streets with the sites where music was physically made, recorded and played. The presence of the map gives potential tourists useful material to build a customised music tour according to their interests and is therefore very relevant in terms of music tourism.

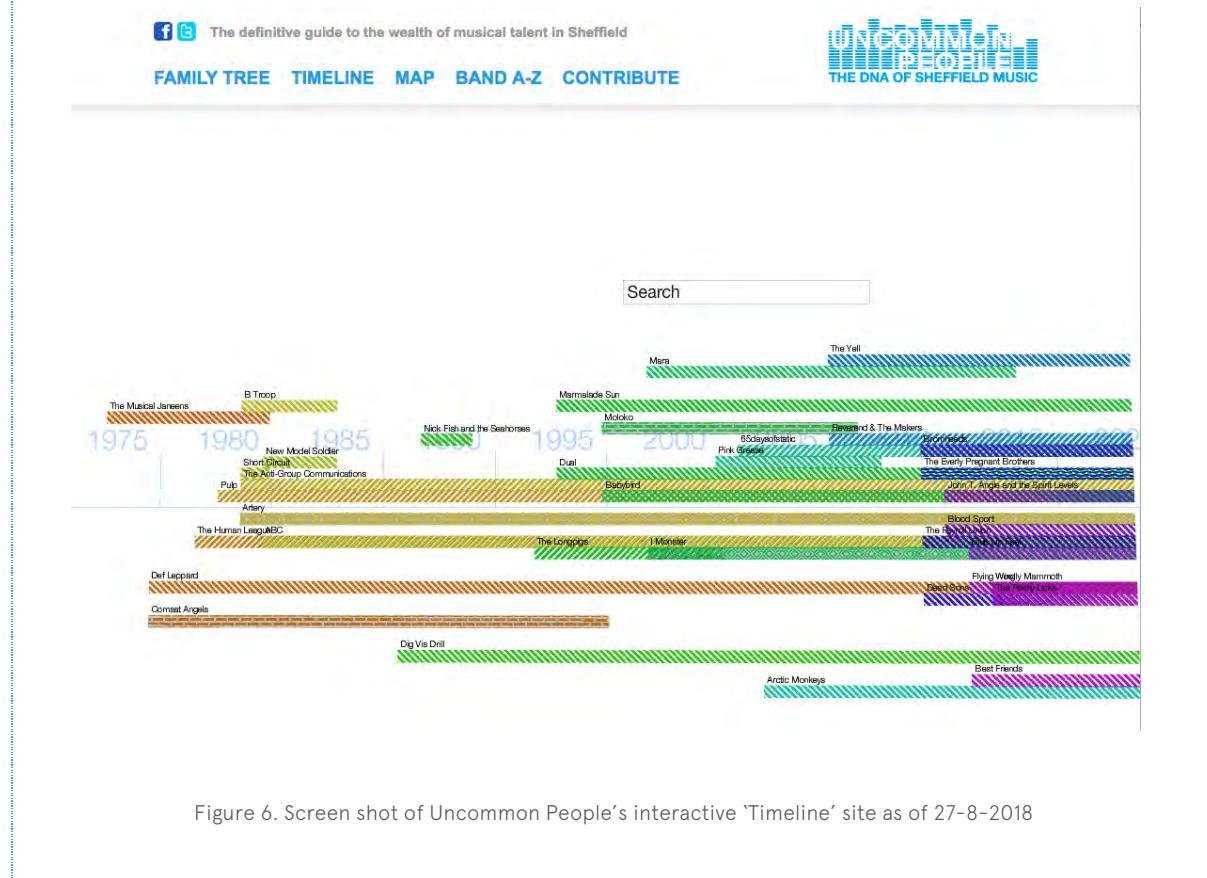


Figure 6. Screen shot of Uncommon People's interactive 'Timeline' site as of 27-8-2018

12.3 Create a music heritage tour

A tour would serve to show the uniqueness and historical weight of the city's music heritage and is a tried and tested formula that is proven to be a very attractive product for tourists and music lovers. Special tours could be created to coincide with live music events, special film screenings or exhibitions. The music tour initiative could be expanded into a full Cardiff music heritage guide and repository, by developing a map, a database of historic music spaces, and an archive of all relevant music assets.

MAGICAL MYSTERY TOUR, LIVERPOOL¹⁰⁰

The Beatles' enduring legacy has been a crucial asset to developing Liverpool's music tourism offer, as the multitude of tours dedicated to uncovering the band's relationship with the city shows.

Set aboard a fantastically coloured bus, the Magical Mystery Tour is one of the city's most popular music attractions, with well over 2000 Tripadvisor reviews. The two hour tour tells the story of the band's origins, and how they came to conquer the world. The tour includes band members' birthplaces and childhood homes, Penny Lane, St Peter's Church where John and Paul first met, Strawberry Field, schools and colleges plus many more places of interest along the way. The last stop is the Cavern Club, and a ticket to the tour also includes free entry in the evening to the Cavern front stage.



¹⁰⁰ <https://www.visitliverpool.com/things-to-do/beatles-magical-mystery-tour-p172251>

FURTHER ACTIONS:

12.4 Bid to host key international music industry events

Becoming a host city for a well-known international event will have an immediate impact on Cardiff's branding as a Music City, in the local and international music sector, and tourists alike. The Music Office should lead on the bid to host at least one high-profile UK/international music industry event (eg BBC Amplify), and one UK/international celebration of the grassroots sector (eg Music Venues Day, partnership with a showcase festival) that can be used as a twofold opportunity for music export and import in Cardiff.

12.5 Explore a partnership with Bristol's Colston Hall

Bristol's Colston Hall is closed for major refurbishment from June 2018 until sometime in 2020. This offers a real opportunity for Cardiff to bring artists, promoters and events into Cardiff who would not normally cross the Severn Bridge — much like the closure of Wembley created an opening for the Millennium Stadium. A cooperative strategy between the Wales Millennium Centre, St. David's Hall and New Theatre venues could reap long term rewards for the venues and for the City.



Sacred Paws, Wales Goes Pop.
Photo: Pete Takes Pictures

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APPENDIX 1

MUSIC TOURISM & BRANDING CASE STUDIES

Hamburg

Hamburg is known historically for its contributions to music history and continues to promote its legacy as a pioneering location with its Music City strategy. The government has worked alongside the music industry to create a music tourism strategy and brand in order to promote the creative industries. This includes the promotion of its live music scene and the development of the spectacular Elbphilharmonie.

Hamburg has a music tourism strategy which attracts thousands of visitors every year to the city. As mentioned, live music is part of the core identity of Hamburg and has been promoted as one of its strongest assets. The city has designated budgets for the marketing of the music industry and supports renowned music events such as Rock am Ring, Wacken Open Air, and Reeperbahn, which rate among the top brands globally and enjoy widespread international popularity. Reeperbahn doubles as one of the most important conferences of the music industry, making it the most important festival of its kind in Europe, similar to SXSW. Every year, this festival attracts an average of 30,000 industry professionals and festival goers who contribute significantly to the overall economy of the city.¹⁰¹

Perhaps the biggest contributor to the current boom in music tourism is the world-famous Elbphilharmonie.¹⁰² Devised in 2003, and finally completed in 2017, this grand infrastructure has become the crown jewel in Hamburg's beautiful cityscape. Located on the banks of the Elbe river, the impressive building contains three concert halls, a hotel, 45 private apartments, and the publicly accessible Plaza with a 360° panoramic view of the city. In the first year of its existence, the center has welcomed 4 million visitors, making it an instantly popular tourist attraction. Every day the space sees up to 17,000 guests a day who come to attend a concert or walk around the structure. According to a report, the tourist industry grew in Hamburg by 3.7% in 2017 and this is linked directly to the new venue space. Overnight stays by guests from abroad grew 5.15% after increased media attention which has recognised Hamburg as a top tourist destination.¹⁰³ The designation as a UNESCO World Cultural Heritage Site has also enhanced Hamburg's image considerably.

¹⁰¹ <https://www.hamburg-tourism.de/erleben/>

¹⁰² <https://www.elbphilharmonie.de/en/>

¹⁰³ https://www.elbphilharmonie.de/media/filer_public/43/86/4386f78b-fd9a-4137-b929-334ad1bf857e/broschüre_elbphilharmonie_hamburg_eng.pdf

In addition to the international tourism the centre has attracted, the Elbphilharmonie is also a core staple of the local community. It has become an outreach centre for schools' education programmes, and has provided a cultural space for the refugees Germany has accepted.

The strategy continues into 2018 as state-funded marketing companies have launched three campaigns to promote Hamburg as an attractive travel destination. Of these strategies, one of them is "Hamburg ist live/Musikstadt" (Hamburg is live/Music City).¹⁰⁴ The main goals with this campaign are to portray Hamburg as open, creative and tolerant. Some of the immediate actions taken to support the musical arts in Hamburg include hosting the internet domain, www.kulturmedien-hh.de as the new platform where musicians and music businesses can access marketing opportunities. Some of these opportunities include culture columns, launching KulturSpots, and creating new cultural facilities. There is also access to television and video advertisements on the subway for the creative industry to use either for free, or for a highly subsidised cost of €30 for a minimum period of 4 days, with no production costs.¹⁰⁵

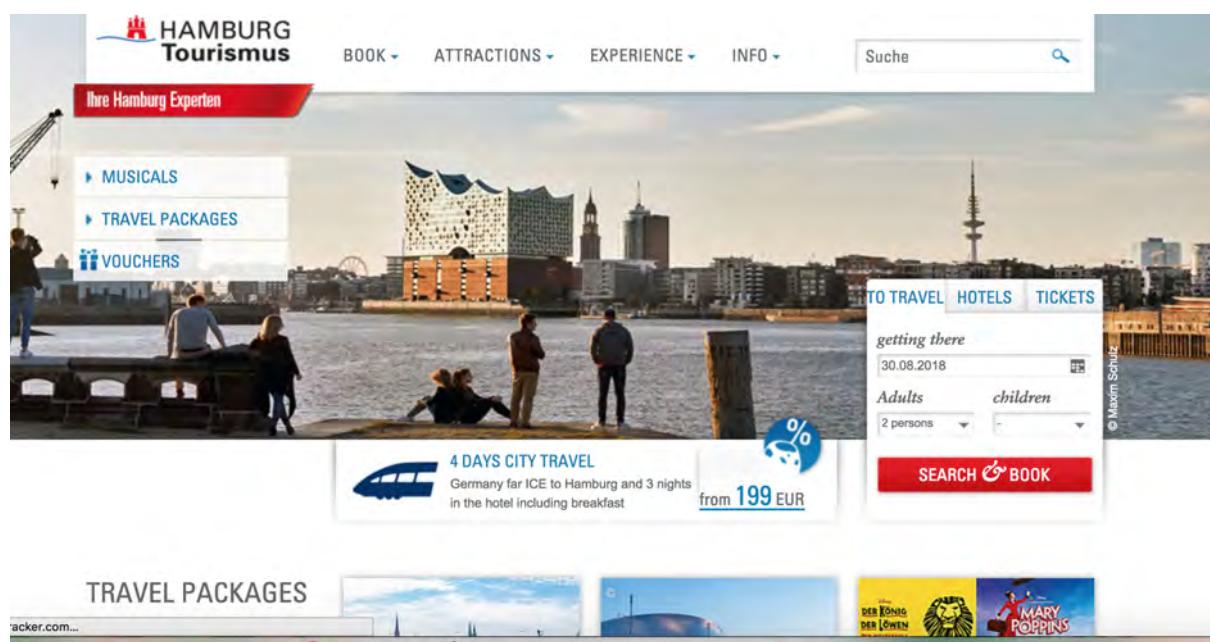


Figure 7. Screen shot of Tourism Hamburg's website as of 23-8-2018 (1)

The website featuring current events in Hamburg is easily understood and direct. The main tourist page has "Musikals" (Musicals) as one of its most identifiable tabs which is helpful

¹⁰⁴ <https://marketing.hamburg.de/music.html>

¹⁰⁵ <https://www.farid-mueller.de/wp-content/uploads/Musikstadt-Hamburg.pdf>

for those who are looking for cultural activities. However, to get to live music outside of theatre there has to be more research via the "Experience" tab which makes navigating on to music somewhat confusing. There is nothing to distinguish the cultural events page from the other directories, but nonetheless the design, colour and layout of the page give it clarity and it offers a wide variety of options for venues to visit. Since cultural events — and music in particular — are often vibrant, there is an opportunity to make the Events page more striking. It could easily feature more images of the kind of events celebrated. A great aspect of the website is the option to search for events during a specific time period and within a certain category, which is very convenient for tourists and residents alike who are looking for choice.

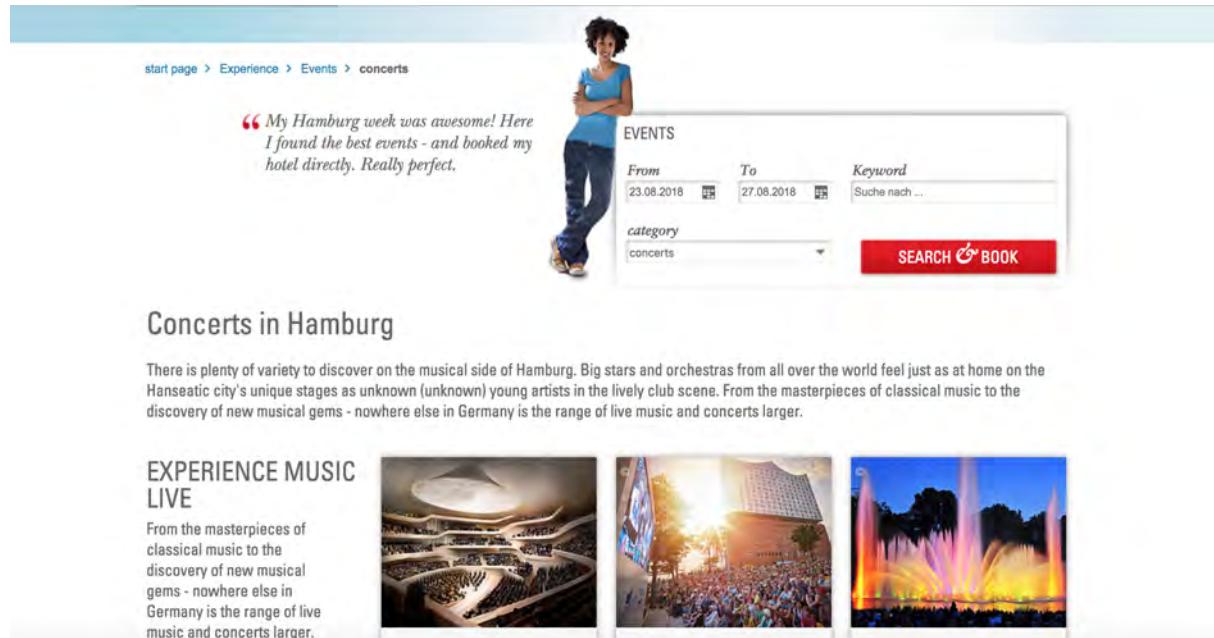


Figure 8. Screen shot of Tourism Hamburg's website as of 23-8-2018 (2)

Austin

Austin was branded "Live Music Capital of the World" in 1991. It is a registered trademark associated with the city after it was discovered that Austin had more live music venues per capita than anywhere else in the nation. The city has been sponsoring its wide variety of music offerings ever since and the tourism board's website has a specific section dedicated to the local music scene. Thanks to a vibrant offer and successful promotion and brand positioning, in 2014 the city's output for music tourism was US\$1,105.32 million. In order to understand the effects of the actions taken by the city, the government

commissioned the “Austin Music Census” in 2015 using data-driven research to draw these conclusions.¹⁰⁶

The government’s office for tourism has its own designated “Music Marketing” plan which outlines specific strategies and related tactics in order to execute these goals. They are summarised as follows:¹⁰⁷

- 1. Increase interest in Austin’s live music scene and continue promotion of brand, the Live Music Capital**
 - a. Increase content on Austin CVB website with more music content such as video, photos, facts, City of Austin music programmes and genre-specific information.
 - b. Augment Marketing Communications Department efforts by hosting journalists to increase editorial coverage of and about Austin music.
 - c. Produce a new compilation CD and download cards of Austin music and a mini guide to Austin’s music scene.
 - d. Create a line of merchandise to promote the Live Music Capital of the World® brand; sell on ACVB’s website as well as at select Austin retail outlets.
- 2. Promote accessibility of Austin music**
 - a. Solicit conventional sales and service businesses to use local music.
 - b. Manage the “Have You Hired a Musician Today?” programme by assisting conventions, trade shows and local businesses with booking recommendations for live music at events.
 - c. Book music for familiarisation, sales, tourism and media events.
- 3. Collaborate with community partners and the City of Austin on music related issues to strengthen the local music community**
 - a. Work with City of Austin staff, Austin Music Commission and Austin-Bergstrom International Airport year round; communicate the activities of the music office and work to execute the goals for the music community.

¹⁰⁶ https://www.austintexas.gov/sites/default/files/files/Austin_Music_Census_Interactive_PDF_53115.pdf

¹⁰⁷ <http://www.austintexas.gov/edims/document.cfm?id=142178>
<http://www.austintexas.gov/edims/document.cfm?id=239291>

Book all live music for weekly City Council meetings and promote “Live from the Plaza” concert series and airport performances

- b. Work with local music and cultural organisations, such as the Austin Latino Music Association, Health Alliance for Austin Musicians, Women in Music Professional Society, Pro Arts Collective and other cultural arts groups to promote music events that bring visitors to Austin and raise awareness of culturally diverse music
- c. Continue to partner with the local music community in promoting the growth and development of live music clubs, venues, recording studios, record labels and music instrument manufacturers.

4. Raise awareness of Austin as a premier music destination among national and international music industry professionals

- a. Develop promotional materials to promote Austin music and the services of the Austin Music Office
- b. Establish a presence at high profile industry events via showcases, promotional materials, media receptions, and client events such as: Grammy's, MIDEM, CMJ, Americana Music Festival, New Orleans Jazz and Heritage Festival, Latin Alternative Music Conference, Big Apple Barbecue, Coachella and Mostly Strictly Bluegrass
- c. Collaborate with successful Austin touring acts to promote Austin at national and international shows with banners, Austin-centric gift bags, giveaways, contests, takeaways, announcements from the stage and VIP access for clients and media.

The effects of the large investment in music tourism and the marketing of Austin’s local scene have had positive results. A recent survey showed non-resident visitors to a cultural event spend an average of 120% more per person than local attendees (\$42.87 vs. \$19.52). Further, 8.4 % of the non-residents reported that they spent at least one additional night away from home in Austin as a direct result of attending the cultural event (which increased their average spend to \$212.84 from \$42.87). Furthermore, 69.3% of all non-resident respondents reported that the primary reason for their trip was “specifically to attend this arts/cultural event”, and 31.5 % of the resident cultural attendees reported that they would have traveled to a different community in order to attend a similar cultural experience. Therefore, this report shows the importance of a community to provide a variety of artistic and cultural experiences. If they fail to do so, it will fail to attract the new

dollars of cultural tourists while also losing discretionary spending of its local residents who will travel elsewhere to experience this sort of cultural entertainment.¹⁰⁸

The tourism website for Austin is very vibrant. The website reflects the spirit and energy of the city it's advertising as it highlights the importance of food and music right away. The website looks more promotional than educational/city-led. "Music" is one of the clearest tabs on the page. The Music page itself is also substantial and exciting with multiple images from Austin showcases, festivals, and venues. It is also a good decision to include options for Music Stores, Insider Deals, and Maps, as users are more likely to spend more time on the page with these advertisements. Lastly, having Austin Spotify and Austin Playlist tabs are valuable because they showcase the local music in Austin in a contemporary and engaging way that the user can follow for longer than a quick online visit. Additionally, discover tools are more relevant than ever, so having a curated playlist option specific to the local scene is going to attract many visitors and make them more excited and engaged with what is happening in ATX.

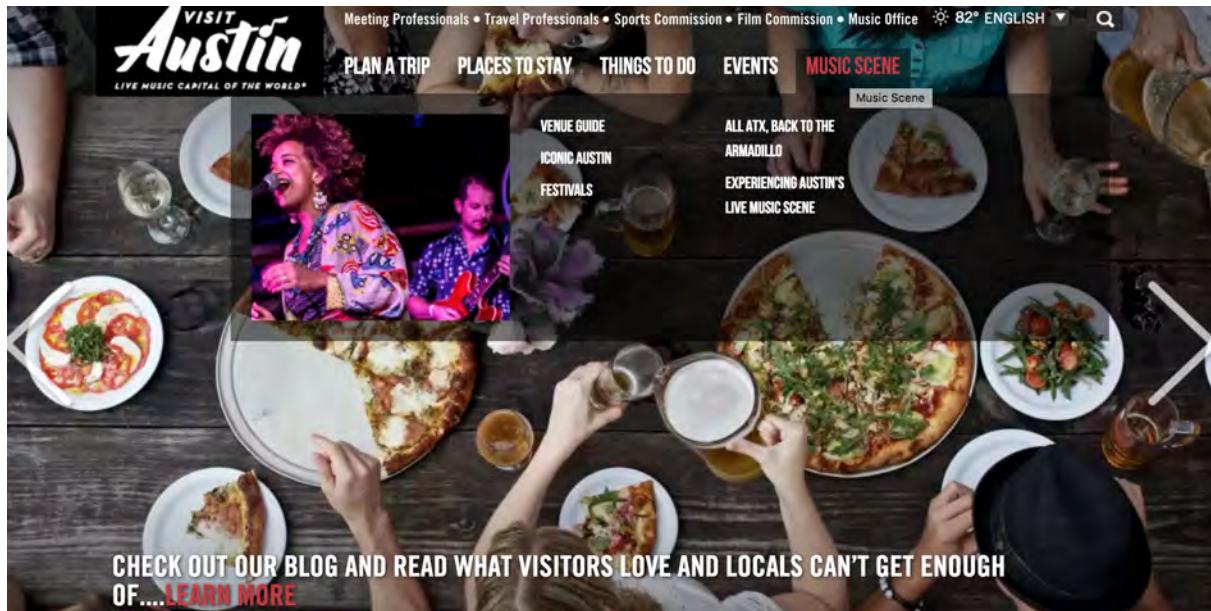


Figure 9. Screen shot of Visit Austin's website as of 23-8-2018 (1)

¹⁰⁸ https://www.austintexas.gov/sites/default/files/files/CT_Plan_Final.pdf

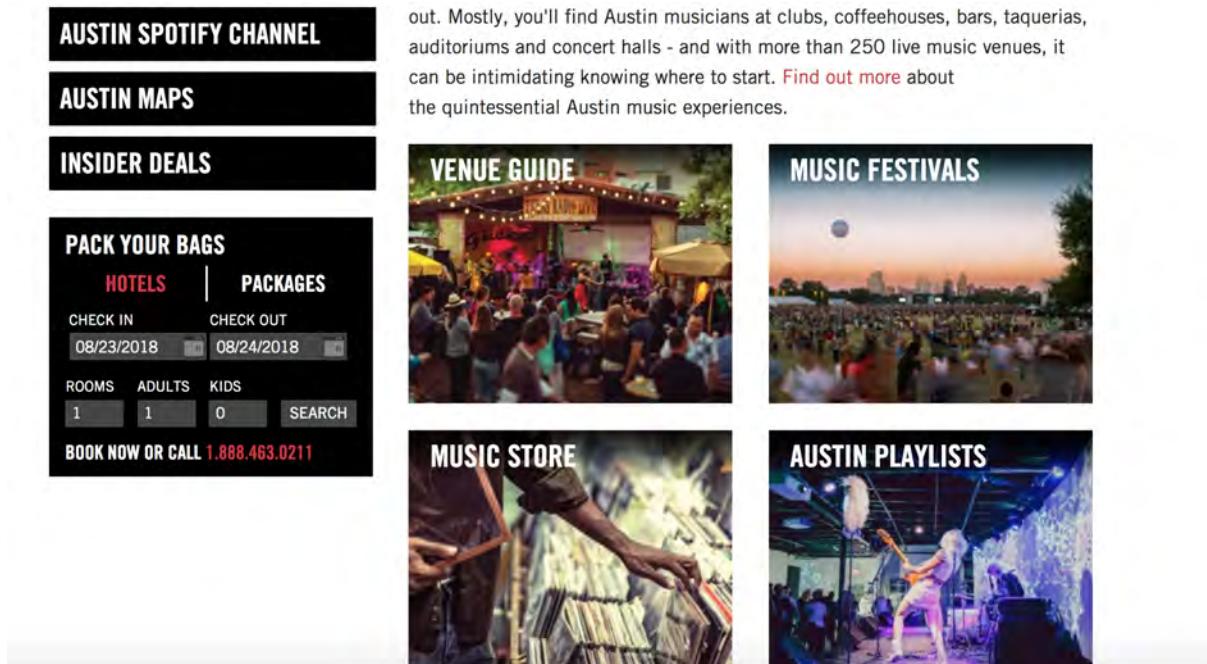


Figure 10. Screen shot of Visit Austin's website as of 23-8-2018 (2)

Aarhus

Aarhus has been considered a Music City for decades with its position as one of the most important cities for producing and creating talent for the Danish music scene.

Music has always been an important part of the city's cultural DNA, and there's a long tradition of a well-renowned, varied and often trend-setting music scene. That scene is rooted in a wide range of platforms around the city – from the Royal Academy of Music to alternative underground clubs. Countless bands originate from the city's strong musical environment and heritage, representing music in all varieties and genres. In addition there are a number of festivals taking place there and educational platforms exist at a high level along with music community platforms. Crucially, music has been made an important part of the city's cultural policy.

Visit Aarhus, the tourism domain for the city, has multiple directories for showcasing the live music in the city, such as Music on Stages, Free Experiences, and it hosts other pages promoting the local music festivals such as SPOT. SPOT is one of the largest music tourist attractions featuring a 8,000-strong international showcase with 100-200 concerts from several Nordic countries. In addition, the city already has an app, AarhusGuiden, and the Kulturportalen — a website with all the cultural activities taking place including a calendar option to filter events. These sources provide an easy tool for visitors to access information on the events they are travelling to Aarhus for.

PROMUS¹⁰⁹ (Production centre for music, film, stage, literature, arts, dance etc.) receives funding from the state to carry out its initiatives which include funding programmes for different music projects, creating a one stop shop for promoters, and the creation of Aarhus Events – a city event office. This office is specifically important to the branding and promotion of the city in that it attracts, develops and supports large, strategic events with an emphasis on cultural events like music festivals. These efforts by public and private groups are helping the overall economy of Aarhus as shown by the 2,500 musicians, 1,100 employees and a turnover of 1.8 billion kroner.

Lastly, as 2017's European Capital of Culture, Aarhus developed a set of strategies to distinguish itself as a centre for the arts and creative culture. Some of these efforts were focused around the music industry which brought more attention to this area. For example, the city focused on programming more at the Urban Mediaspace to increase international attention to see the designs of leading Scandinavian and international architects while linking these events to other programmes such as festivals and music events. All of these programmes are centred around the campaign's theme of "rethink__". In addition, all efforts were themed and packaged in collaboration with the tourism sector. From these intentional partnerships and promotions the city expects to see a 25% increase in cultural tourism by 2020.¹¹⁰

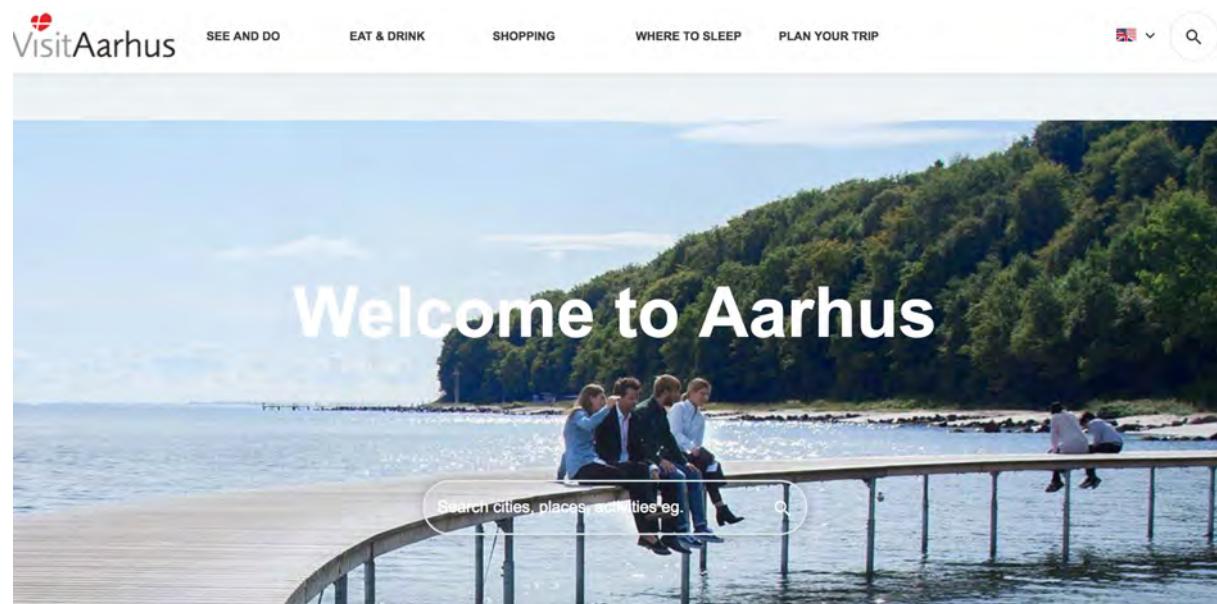


Figure 11. Screen shot of Visit Aarhus' website as of 23-8-2018 (1)

¹⁰⁹ http://www.promus.dk/files/MusicCityAarhus2015_net.pdf

¹¹⁰ <http://archive.thedailystar.net/newDesign/news-details.php?nid=268370>

Aarhus has a very clean and contemporary design to its tourist page. The landing page features large, gripping images of the location and the events happening there. There is no immediate culture-grab or music-related tab for users to clearly engage with. Instead, music and other events are found under the drop-bar for "See and Do" and are hidden in a large list of choices for users to navigate. Once the "Music" tab is selected, the main page continues to show all entertainment events, but offers a filter option for music-only. The page shows the images of artist and festivals in a grid fashion which is clear for users and provides them easy navigation once they get this far. Furthermore this page provides the option for users to search events on certain dates which is very convenient and direct.

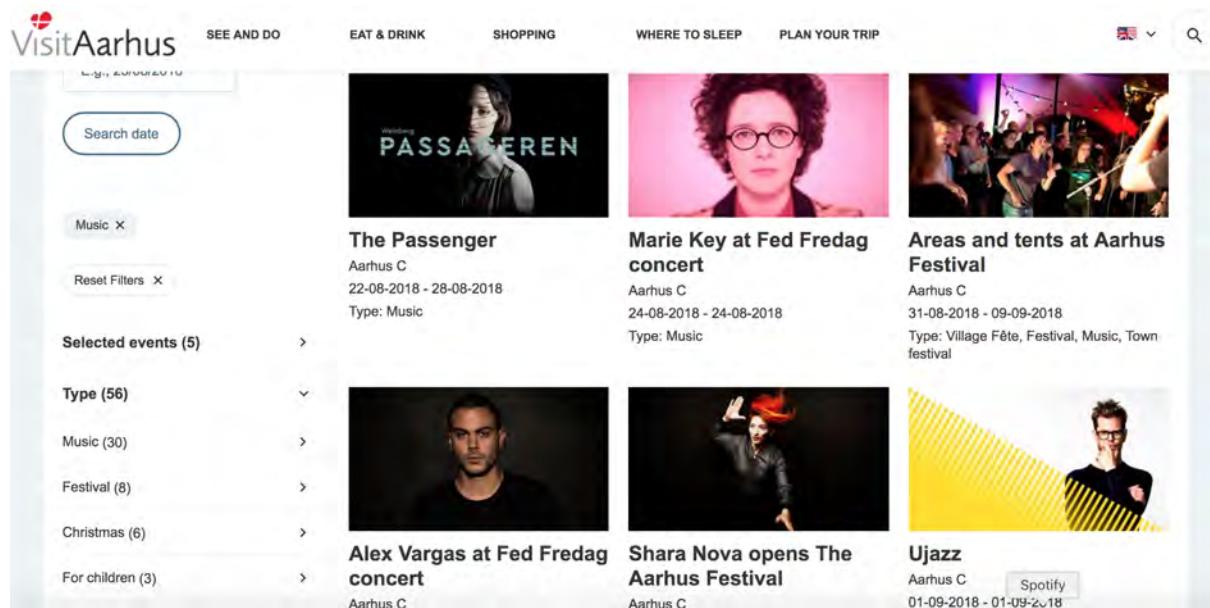


Figure 12. Screen shot of Visit Aarhus' website as of 23-8-2018 (2)

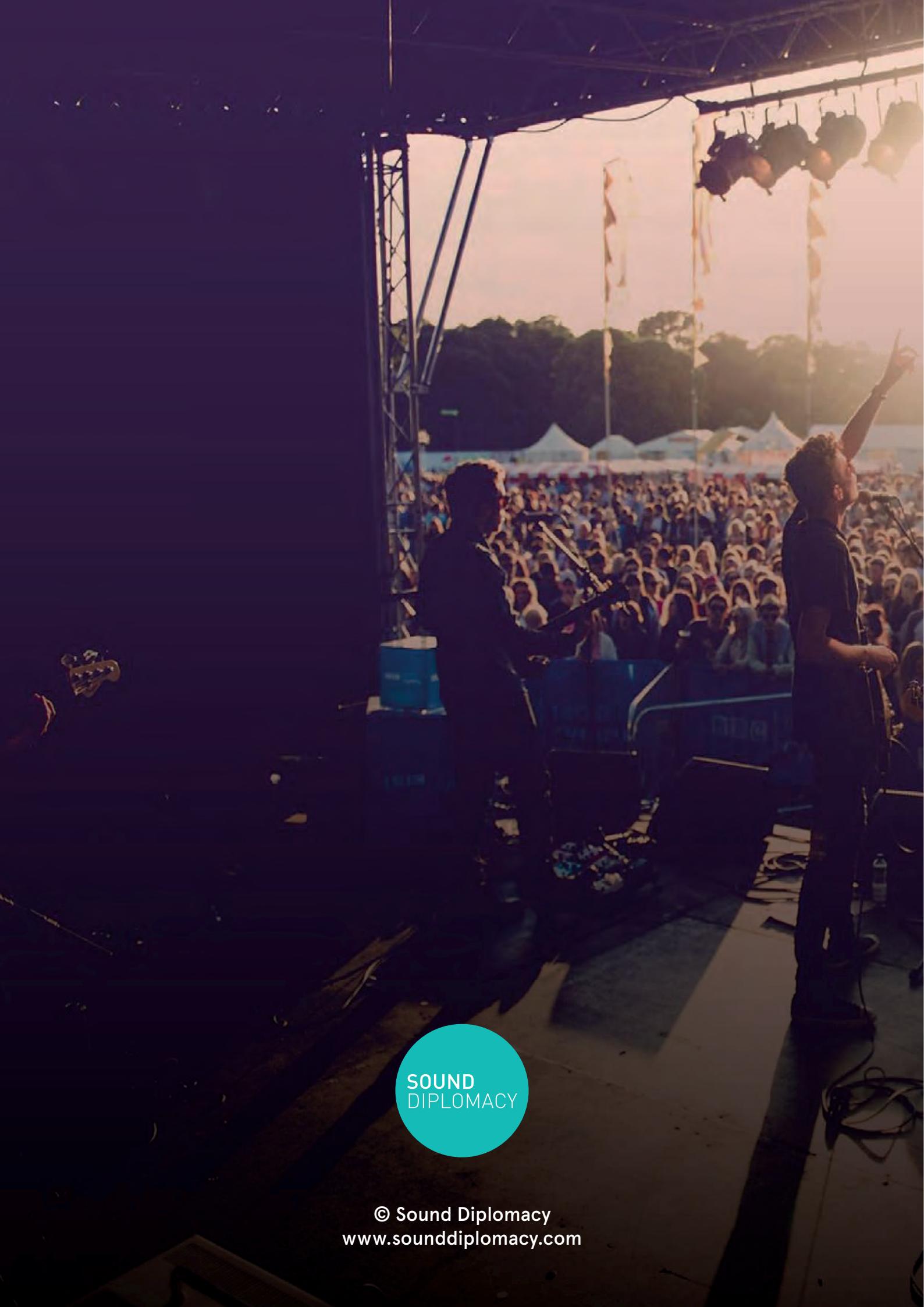
APPENDIX 2

UK Standard Industrial Classification (SIC)

18201: Reproduction of sound recording
32200: Manufacture of musical instruments
46431: Wholesale of gramophone records, audiotapes, compact discs and videotapes and of the equipment on which these are played
46439: Wholesale of radio and television goods and of electrical household appliances (other than of gramophone records, audio tapes, compact discs and video tapes and the equipment on which these are played) n.e.c.
46491: Wholesale of musical instruments
47430: Retail sale of audio and video equipment in specialised stores
47591: Retail sale of musical instruments and scores in specialised stores
47630: Retail sale of music and video recordings in specialised stores
59200: Sound recording and music publishing activities
60100: Radio broadcasting
85520: Cultural education
90010: Performing arts
90020: Support activities to performing arts
90030: Artistic creation
90040: Operation of arts facilities

Categories

Recording and Publishing	46431, 18201, 59200, 47630
Licensing and Copyrights	90030
Touring and Live	90010, 90020, 90040
Instruments & equipment	46491, 32200, 47430, 47591
Supporting industry	60100
Education	85520



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