

Agenda – Culture, Welsh Language and Communications Committee

Meeting Venue:

Committee Room 2 – Senedd

Meeting date: 2 October 2019

Meeting time: 09.30

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1 Introductions, apologies, substitutions and declarations of interest

(09.30)

2 Inquiry into live music in Wales: Arts Council of Wales

(09.30–10.30)

(Pages 1 – 26)

Antwn Owen–Hicks, Portfolio Manager, Arts Council of Wales

Carys Wynne–Morgan, Portfolio Manager, Arts Council of Wales

3 Inquiry into live music in Wales: Music Venues Trust

(10.30–11.20)

(Pages 27 – 42)

Mark Davyd, Chief Executive, Music Venues Trust

4 Inquiry into live music in Wales

(11.20–12.20)

Professor Paul Carr, Professor in Popular Music Analysis, University of South Wales

Bethan Elfyn, Presenter, Producer and Project Manager, BBC

5 Papers to note

5.1 Correspondence with S4C

(Pages 43 – 46)



6 Motion under Standing Order 17.42(vi) to resolve to exclude the public from the remainder of this meeting

(12.20)

7 Private Debrief

(12.20–12.30)

Document is Restricted

National Assembly of Wales Culture, Welsh Language and Communications Committee's Inquiry into Music industry in Wales.

Arts Council of Wales' response.

Arts Council of Wales supports music making and performance in many ways, across many genres, throughout the nation. As we understand it, this Inquiry focusses on non-operatic and classical music and as such our response concentrates on these other genres.

The impact of local authority decisions such as business rates, licensing and planning decisions

Cardiff Council recently commissioned Sound Diplomacy to conduct a review of the music ecosystem in the capital. The resulting report articulates a number of challenges as well as presenting actions that could address these and help the City realise its potential as a music city. We particularly welcomed their approach, seeing music as an inter-connected cultural system. For example, investment in music services and community spaces will eventually lead to economic development in terms of nighttime economy and destination tourism. It will also contribute to the wellbeing and opportunities of those accessing such services in the short term.

We were happy to feed into the Sound Diplomacy review and look forward to further discussing when the recommendations are taken forward. Additionally, we supported the recent Cultural Cities enquiry. This report makes some suggestions around potential income streams that could benefit live music venues. This deserves to be investigated.

As an arts council we take a wide view on the definition of culture. We would like to see this definition adopted when local authorities apply business rates. This would mean that small business, such as live music venues, would be afforded the same treatment as the more recognised cultural venues.

Culture is one of the pillars of the Wellbeing of Future Generations. As such we would support the proposition that cultural opportunity – in the form of buildings and resources – should be mainlined into any long term development plan. These spaces – which can include venues and rehearsal spaces – need to be integrated into forward planning. Looking at 'meanwhile' use and asset transfer, as well as how obligations can be passed on to developers, will better ensure that their plans have adequate provision, especially if their development is displacing current cultural and creative hubs. The planned and imaginative use of Section 106 can

help increase the likelihood of outcomes that have social, economic and cultural benefit.

Local authorities can also help in a number of associated ways – by providing other support such as loading bays, brown signs and legal poster sites. And by taking a pragmatic view to licensing, these spaces could offer much to under 18s if they could only access them.

We also note that a number of Local Authorities in Wales partner in our Night Out/Noson Allan scheme to enable more professional music to take place in local communities, enabled by those communities. More on this later.

The impact of Welsh Government policy on the music industry and live music in particular, including the distribution of funding by the Arts Council

Since 2012, Arts Council of Wales have had a Lottery funding strand dedicated to contemporary music – the Music Industry Development (MID) strand.

It's worth noting that following discussions with the Music Venue Trust, our colleagues Arts Council England recently launched their own Lottery stream dedicated to applications from music venues. Much in the same way that our own MID strand operates, this is open to venues (which can be businesses) with non-profit projects that demonstrate additionality and public benefit. Our own MID strand is not exclusively for music venues, but open to any organisation or individual involved in music – musicians, bands and music organisations, including venues, promoters, managers, labels and publishers.

We're aware that colleagues in Welsh Government's emergent Creative Wales team are in discussion with the Music Venues Trust to look to business support for venues that fall under their definition. We would welcome this as complementary to the public-benefit centered project support that the Arts Council can offer. Through this, we have supported a number of live music projects, as well creative projects. We have also supported new approaches to business models, including Music Venues Trust, Independent Music Venues Week, Forte Project, Trac's artist development work and a number of label releases.

Since 2011 we have had a dedicated Festivals funding strand. Festivals are another important way that the public access live music, often for the first time, as well as providing a platform for Welsh artists. Previously supported festivals include Focus Wales, Tafwyl, Swm, Wrexfest, Fire in the Mountain, Green Man and Llangollen Fringe.

Our Lottery strategy is currently under review following a period of public consultation. One of the emerging themes is the need to make applying a more simple process and we'll see this priority reflected when the new programmes go live in September. These programmes and processes will be shaped by the

commitments we have made to equalities, widening engagement and sustainability.

As we'll outline later, dedicated music venues are very important but they're not the only places that live music happens. This is especially the case outside cities and larger towns. Another longstanding programme run by the Arts Council is Night Out/Noson Allan. This empowers community groups to programme professional work in venues within their locality by offering a financial incentive (a guarantee against loss). This could be in a village hall, institute or side room in a pub. Music is an extremely popular on Night Out/Noson Allan. In 2019/20, 41% of performances were music (not including opera and classical), 205 in total.

Recently we have met with Pyst (the Welsh Government supported digital distribution and development company, particularly looking at Welsh language music). Along with other support options we have discussed with them how they can use the scheme to encourage their network of labels to promote live music through Noson Allan. We're starting to see this happen. We're also exploring how we can partner with colleagues in Welsh Government on Dydd Miwsig Cymru to similarly support Welsh language gigs. For those using Night Out/Noson Allan, it is a grassroots up approach to booking live music, supporting those on the ground to consider using the scheme on a regular basis and developing links with local audiences, rather than doing a 'one off' gig organised centrally. We hope this approach will be more sustainable.

Other Arts Council funding opportunities are also open to music venues, such as our Capital programme. We supported Clwb Ifor Bach's feasibility study into developing the building into an increased capacity, accessible venue on the adjoining building's footprint. We believe that this development will futureproof an important cultural organisation and we're continuing discussions with them on how we could further support them to realise their ambitions.

We have also been involved in the establishment of Anthem, a national endowment for music. It's still at an early stage, having recently become an independent organisation. The new board is researching fundraising in the shortterm, but Anthem is committed in time to supporting young people across a broad range of music activities and genres. Anthem is already meeting with some of the organisations mentioned in this document.

The availability of suitable venues for live music across the country

We are aware that colleagues in Welsh Government's Creative Wales intend to carry out a mapping of music venues in Wales. In our experience, the number of Grassroots Music Venues (GMVs – a Music Venue Trust Definition) is low, particularly

outside the main cities and town. That's not to say that live music isn't in these areas, but that temporary spaces, popups and back rooms often are the place to find it.

GMVs have been lost in recent years for different reasons:

- Noise abatement (now hopefully addressed through the Agent of Change implemented by Welsh Government) in the case of The Point (Cardiff)
- landlord development in the case of Gwdihw (Cardiff)
- business feasibility in the cases of Parrot (Carmarthen) and Live Rooms/Central Station (Wrexham, but new owners have recently been confirmed and reopening planned).

Other venues, like Le Public Space (Newport) and Clwb Ifor Bach (Cardiff), have used such threats to radically change their operational model to look at both a wider cultural and business offer. Clwb Ifor Bach has gone through significant governance and business planning changes, broadening their aims and objectives and applying to be a charity. Le Public Space have taken the inspiring lead in developing a community shares offer, working with Wales Cooperative Centre, and relocating to new premises that are open in the day too. Similarly, The Moon (Cardiff) is run as a collective, with a clear social purpose, supporting marginalised genres, putting on events for those who cannot access evening shows and hosting networking events to encourage more women in the industry.

It does, however, raise the question what we mean by suitable venues. To us it's more than a stage and a PA. It means accessibility – physical (Attitude is Everything so brilliant work on this) but also ensuring spaces feel inclusive and non-threatening. Increasingly this can mean spaces less reliant on alcohol takings and seeking diversification of income.

It's important to note the number of other spaces that have appeared in this time and that are programming music regularly. Often they're doing this as part of a wider community offer, but may not be seen as 'fulltime' music venues. UnDegUn space (Wrexham), Pie Records (Colwyn Bay) Neaudd Ogwen (Bethesda), Unit 11 pop up (Swansea).

Whilst not GMVs, many of our supported arts centres also offer a substantial live music programme; Galeri (Caernarfon), Mwldan (Cardigan), Theatr Brycheiniog (Brecon), Welfare (Ystradgynlais), Aberystwyth Arts Centre, Ty Pawb (Wrexham), Theatr Clwyd and Rhondda Cynon Taf Theatres included.

It's not just about venues, fulltime, part time, permanent and temporary. Festivals and promoters are key links in the chain. Both can programme live music in unexpected places. A key new music showcase festival, Focus Wales, makes use of churches, tipis, pubs and public halls.

The opportunities for talent development, from grassroots to larger venues

Our flagship development partnership for new talent is “Horizons Gorwelion”, which we co-invest in with our partners BBC Cymru. The aims of this project are to develop emerging talent – in both languages –and help it find a platform, using the BBC (online, radio, TV and links to BBC network) and other opportunities (A&R events, showcase slots, festival stages). It also offers “Launchpad”, a simple annual fund that artists can apply to for seed funding for projects to take the next step in their career.

In the four years that the programme has been running, we've had a number of success stories and there has been no drop in demand. There were over 200 applications this year. We're also seeing progress in terms of a vast increase in women applying and these from urban and MOBO genres. The project has built recognition in the industry, with strong relationships with key sector events (Great Escape, Focus Wales, Liverpool Sound City) as well as supporting live music opportunities across Wales.

The project works with 12 key artists and bands through the year but also with a wider group of acts depending on the opportunity.

Another development project is Forte, run by RCT Council in partnership with the other Arts Connect local authorities. They mentor young acts, building 'teams' with their peers to give them the key skills to get their music out there and play live as well as providing wider social and personal development. They too have links with promoters, such as Orchard, that continue to support acts and many of the alumni go on to become Horizons Gorwelion acts.

A key event in the calendar for music talent is Focus Wales, taking place in Ty Pawb in Wrexham by day and spreading out across the town by night. As well as a range of Welsh acts, from the emerging through to the established, it also platforms international talent and programmes a quality conference. This allows artists who play the opportunity to network and showcase to the industry and press on home turf. We also support Focus Wales to take our music talent to the world, through support of their music export plans including events such as SXSW and Breakout West, Canada.

If we look at music as an ecosystem, it is important to note that community music-making and education play a key role in lighting that initial spark that can lead to a lifetime of music creation and a potential professional career, regardless of background. The excellent work that Community Music Wales and Canolfan Gerdd William Mathias do in this area should be acknowledged.

In terms of the live music progression 'ladder', it's often been noted that in the Capital there are gaps in venue infrastructure. We hope that our support of Clwb Ifor Bach and the increase in capacity that the development affords them will go some way towards addressing this in the future.

We're not alone in supporting work in talent development. We have a close partnership with PRS Foundation and support three key strands of work, International opportunities Fund, Momentum (with Creative Wales) and Beyond Borders. All three offer opportunities to artist to progress their careers, based in Wales. PRS-F also additionally support three Talent Development Partners in Wales – Focus Wales, Ty Cerdd and Forte project, all of which also receive arts council funding.

Another challenge is the difficulty that artists face in getting a live agent. In Wales we don't have many agents at all, or indeed managers. And whilst initiatives like Forte and Horizons Gorwelion provide some development support, this is no replacement for music industry teams. They offer preparation and connections to these networks and do not take the place of them.

The challenges and opportunities for making and distributing music in the Welsh language

Digital developments mean that artists making music in Welsh can reach a much wider audience, most notably demonstrated by Alffa's record-breaking Spotify streams. The work that Pyst have done in providing label services to artists and micro labels that don't know how to go about getting their work on line has made a difference and one they are now looking to extend to live music.

There are some notable examples of success, with 9 Bach signing to Realworld after benefiting from opportunities such as Womex in Cardiff in 2013. Calan have toured America several times. HMS Morris and Ani Glas have been selected for Canadian showcases. Cate Le Bon and Meilyr Jones (who have been supported by Momentum) are artists that have an international profile but who started out in the Welsh language scene and still contribute to it. Thinking internationally is important for most artists but perhaps more so artists that create music in Welsh.

Signature live events like Tafwyl, Swn, Focus Wales alongside the established Maes B and more local festivals have helped offer opportunities for Welsh acts to play more widely across Wales, although we fall short of having a 'circuit' for Welsh acts.

Though the opportunities offered through Horizons Gorwelion, it's often been the Welsh language acts that have been selected for showcases (Swnami at Eurosonic for example). This is a reminder that language isn't a genre and shouldn't be a barrier.

The impact of disruptive digital technologies on the profitability of recorded music, and the impact on music producers and retailers;

Since the 1990s and the days of Napster there have been many articles on how digital developments have broken established models and radically changed the music industry. Welsh artists are not alone in being affected by these macro shifts. Income streams have changed. Streams don't deliver the same royalties as physical sales. But overheads can be lower and it's easier for labels and self-

releasing artists to get their music aggregated to key platforms than it was to get a physical distribution deal in the old days.

Digital in many ways has democratised music making; enabling cheaper recording with basic equipment, digital sharing and social media to get the word out. This has to a point displaced studios, especially in the early stages, but are still necessary to get professional results. Similarly retail has changed, with audience habits swaying towards 'consuming' music through subscription streaming models. But there's also been an increase in the value placed on vinyl and quality tangible releases, as demonstrated at events like Record Store Day.

Digital developments mean that it's possible for artists to connect (directly) with audiences beyond Wales. The first step to doing this is for artists to ensure that music is available on key platforms like Spotify. We have a rich number of Welsh micro labels and self-releasing artists in Wales, and Pyst has been able to offer them label services to do this based in Wales.

This brings a huge amount of opportunity, especially for Welsh language acts that might have felt they had limited outlets in Wales, or those of genres that lack infrastructure in Wales, like urban. However, it also means that artists have to do more to stand out in a very crowded marketplace, especially new acts out that don't have an established fanbase already. A difficult thing to do with no team, expertise or budget.

The shift in the music industry has meant that the early label development investment in artists is not happening as it used to. Artists are expected to do much audience and profile raising themselves, which is why talent development initiatives are important in levelling the playing field of opportunity and equipping artists to do this.

Other changes – such as the drop in PRS rates for radio play on Radio Cymru and Radio Wales and the establishment of EOS – have also had an impact, particularly on artists that depended on this regular income. For younger artists that have never known such rates, it is usually less of a consideration but does certainly mean that making a living from music is more difficult and involves a portfolio career (which could involve other sources of related income such as teaching, producing, working in sound or education).

This supports, for us, the case that you need to be investing in developing the artist as well as the infrastructure. Without their creativity there is no arts and with so much of the added heavy lifting to be done early career, it can look very daunting. Without this support, opportunities will only be offered and taken advantage of by those that can afford it. As Vanessa Read, the outgoing CEO of PRS Foundation puts it, "talent is everywhere, but opportunity isn't".

The viability of the traditional Welsh music scene and festival sector - Developing new voices

trac-Music Traditions Wales (an Arts Portfolio Wales organisation) has been undertaking development work in the folk and traditional music sector for over 20 years. Its work has been aimed at developing young musicians, the community sector, sessions and informal playing. Additionally, has supported semi-professional and professional artists, with projects such as Yr Arbrawf Mawr/The Big Experiment, Deg Mewn Bws, Gwerin Gwallgo and professional development training.

The **Lorient Inter-Celtic Festival** is one of Europe's most important showcases for traditional music. Since the Year of Wales at the Festival in 2008, there has been a marked increase in the development of the traditional music sector in Wales. The event was a catalyst for a number of artists who have since gone on to develop strong careers in the sector, as performers, tutors, producers and management.

Calan, as a group of five young people launched their career at Lorient in 2008, and they have gone on to tour widely, taking Welsh traditional music to new audiences in the UK and around the world. Ten years on and the Year of Wales in Lorient in 2018 saw the development of **Pendevig**, a 15-piece band capable of playing some of the biggest stages in the world, a development almost unthinkable ten years ago.

There's also a range of new, emerging artists such as **VRI**, **The Trials of Cato** and **NoGood Boyo**, all bringing their own approaches to traditional material. There is growing confidence in, and demand for our indigenous traditional music.

It's important to note, that underlying the success of performers such as those noted above has been a vibrant grass-roots scene of people playing for the sheer joy of it – pub sessions, kitchen music and informal performances. Young people need access to the music, to be inspired by the quality and success of professionals. Many of the musicians involved in the professional scene also tutor on courses such as trac's youth course, **Gwerin Gwallgo**, out of which has developed **Avanc**, the National Folk Ensemble of Wales. Fifteen young people, arranging, composing and performing under the artistic direction of Patrick Rimes (Calan). The course takes place at the **Urdd's** centre Glan-Llyn. There's potential for developing further work in partnership with the Urdd.

The WOMEX effect

In 2013, Arts Council of Wales brought WOMEX to Cardiff. WOMEX is the most important international market for world music. It was an opportunity to introduce

and showcase artists from Wales to a new audience of promoters, agents and festivals. As a result, **9Bach** signed with **Real World Records**, going on to create an award-winning album and tour the globe with their own brand of traditionally inspired Welsh music.

Following the Year of Wales at Lorient in 2018, Arts Council of Wales presented a showcase of Welsh artists at English Folk Expo, as the 'International Partner'. It was an exceptional opportunity to present Welsh music, culture and language to a whole new audience. 9Bach secured a top UK agency and the other artists, **Catrin Finch & Seckou Keita**, **Alaw** and **Gwyneth Glyn** developed new contacts, secured bookings and changed peoples' perceptions of Welsh folk & traditional music.

A milestone reached

The first **Welsh Folk Awards** were held in April 2019, a partnership between trac, BBC Wales, Radio Cymru and Arts Council of Wales. Arriving at a point where there are now sufficient artists of high quality to undertake an awards event demonstrates a significant amount of development over many years. This stretches back well beyond 2008, and is a 'milestone' achievement for the sector. The event was a great success, both for the BBC and the artists, and provided a new platform for audiences to encounter the music.

Some key challenges

Despite the many successes, the sector as a whole is under-developed compared to those of our neighbouring nations. The actual numbers of musicians involved in the sector professionally is very low, despite the fact that fees can often be better in this sector compared to those for contemporary music, especially in early career. There are very few people in management or agency positions in Wales supporting this sector, so Welsh artists need to look outside Wales for agency representation.

A touring circuit for live traditional music exists in Wales, but it can be easily saturated. There is a good spread of venues and festivals programming folk and traditional music but making a living from touring in Wales alone isn't viable. Welsh musicians will always need to look further afield, to UK national and international markets. There is a vibrant folk and traditional music touring circuit in the UK, clubs, venues and festivals, but accessing the circuit in England and Scotland is a challenge without good agency or management representation. More Welsh acts are making headway, but it remains a stubborn market for many to break into. Showcasing events have played an important role in introducing the music to promoters, and we would hope to target other opportunities, such as **Showcase Scotland** at **Celtic Connections**.

Trac continues to play a crucial role in early development and professional support, but it is a small organisation, with limited resources. Festivals like the Lorient Inter-

Celtic provide an annual international platform for artists from Wales, where they meet musicians from other cultures, play to new audiences and gain valuable performance experience. There is a growing demand for traditional music from Wales, but resource is needed to support future development, at all stages of the sector, from grass-roots youth work through to professional touring acts, performing at major festivals and venues. The 'support sector' of managers and agents is particularly in need of development, to support the growing scene. **PYST** has started to represent some traditional music artists and it will be interesting to see how this support develops over time.

Arts Council of Wales has provided grant funding to support marketing, promotion and touring for folk and traditional artists, through our **Music Industry Development Fund** and **Production & Touring** funding. We have also supported international performing, collaboration and showcasing through **Wales Arts International's International Opportunities Fund**, and via our contribution to the **PRSF International Showcase Fund**. We support trac with revenue funding as is an APW organisation and the organisation has been in receipt of Lottery grants for its participation and training programmes.

Festivals

The festivals of Wales are many and varied. Sometimes a Festival will represent the only opportunity in a particular geographical area to experience arts activity of that type during the course of a year.

Since 2011 the Arts Council has had a dedicated Festivals funding strand. Festivals are an important way that the public access live music, often for the first time, as well as providing a platform for Welsh artists.

Previously supported festivals include **FOCUS Wales, Tafwyl, Swm, Wrexfest, Fire in the Mountain, Green Man, Llangollen International Musical Eisteddfod** and **Llangollen Fringe**. All of these are leading examples.

We also support festivals with a strong classical music content (**Vale of Glamorgan, Presteigne**) and other festivals such as the **Big Splash, Laugharne Weekend, Sesiwn Fawr** and **Llawn** which programme different genres of live music as part of the offer in the town centres they inhabit. Festivals are key links in the chain. They can programme live music in unexpected places and reach more widely into communities. A key new music showcase festival, **FOCUS Wales**, makes use of churches, tipis, pubs and public halls, and platforms such as **Maes B** at the **Eisteddfod Genedlaethol** enable young people to access and create music through the medium of Welsh. Platforms and opportunities provided by festivals in Wales support emerging artists, develop confidence in performance, allow access

to new and diverse audiences and, in many cases, support career progression and viability.

Our concern for many of the festivals of Wales lie in their reliance on public funding to exist. However, their contribution to the local economy, their increased environmental contribution and potential to improve social cohesion means that investment from the cultural portfolio is valid and valuable. The support that festivals such as FOCUS Wales and Green Man provide to emerging talent and sustainability of career lies beyond the festival site but would not, in many cases, be possible without the festival's existence. Festivals also often provide opportunities for emerging stagehands, technicians, sound engineers etc. and support people to see the breadth and depth of career opportunities within the industry.

Because of the nature of festivals, whether outdoor or building based, there is often a reliance on other areas of the public sector to support developments. Whether through licensing, access to buildings or changes to road infrastructure, there is a need for all public service areas to understand the wider contribution festivals make to the locality in which they are placed. Without this support, or indeed as the public purse is squeezed more tightly, there is a risk that festivals are seen as an added pressure with little immediate reward. Our view, however, is that festivals are a key element of the music sector infrastructure in Wales and that they need increased support to develop viable business models to ensure they can be as sustainable as possible longer-term to further develop and support the artists and communities they serve.

Music Venue Trust response to Music Industry in Wales Inquiry

1. About Music Venue Trust

Music Venue Trust is a registered charity which acts to protect, secure and improve Grassroots Music Venues in the UK. ¹

Music Venue Trust is the representative body of the Music Venues Alliance ², a network of over 500 Grassroots Music Venues in the UK.

A full list of the 34 Music Venues Alliance Wales members is provided at Annex A.

2. Grassroots Music Venues in 2019

A. A nationally and internationally accepted definition of a Grassroots Music Venue (GMV) is provided at Annex B. This definition is now in wide usage, including by the UK, Scottish and Welsh Parliaments. ³

GMVs exhibit a specific set of social, cultural and economic attributes which are of special importance to communities, artists, audiences, and to the wider music industry. Across sixty years, this sector has played a vital research and nurturing role in the development of the careers of a succession of UK musicians, for example The Beatles (The Cavern, Liverpool) through The Clash (100 Club, London), The Undertones (The Casbah, Derry), Duran Duran (Rum Runner, Birmingham), Housemartins (Adelphi, Hull), Radiohead (Jericho Tavern, Oxford), Idlewild (Subway, Edinburgh). All three of the UK's highest grossing live music attractions in 2017 (Adele, Ed Sheeran, Coldplay) commenced their careers with extensive touring in this circuit. ⁴ In Wales, GMVs have played a central role in kickstarting the careers of The Manic Street Preachers (TJs, Newport), Supper Furry Animals (Clwb Ifor Bach, Cardiff), The Joy Formidable, (Central Station, Wrexham), Gruff Rhys (Neuadd Ogwen, Bangor), Funeral For A Friend (Hobo's Bridgend), Skindred (Sin City, Swansea).

B. GMVs constitute a network with comprehensive geographical presence and with a reach that extends into communities which are otherwise not engaging with culture.

"Coming from a rather bleak town such as Doncaster, opportunities are few and far between. These are the places where the ecstasy of musical fusion is both witnessed and achieved for the very first time. They are the cornerstone of modern music itself, the big bang, the beginnings of our time as both music lovers, and musicians." - The Blinders

C. During the last twenty years, this sector has declined substantially:
I. 144 Grassroots Music Venues were trading in London in 2007

¹ <http://musicvenuetrust.com/>

² <http://musicvenuetrust.com/music-venues-alliance/>

³ <http://www.citymetric.com/horizons/year-future-britains-music-venues-was-placed-firmly-political-agenda-1678>

⁴ <http://www.bbc.co.uk/newsbeat/article/34571762/music-venues-in-the-uk-have-reached-crisis-point-says-london-club-owner>

- II. Only 94 GMVs were trading in London in 2016, a reduction in the number of trading spaces of 34.7%⁵
 - III. Iconic spaces in Wales that have closed during this period, including TJs (Newport), Central Station (Wrexham), The Point (Cardiff), Buffalo Bar (Cardiff), Barfly (Cardiff), Gwdihw (Cardiff), The Parrot (Carmarthen), Muni (Pontypridd).
 - IV. Every major town and city saw a decline in the number of trading venues
 - V. Of the 25 venues that launched the live career of Oasis in 1993, only 11 remain open.⁶
- D. Alongside closures, these venues also experienced⁷:
- I. Significantly reduced audience attendances; GMVs operate at significantly reduced capacity, with an average attendance of 160.5, only 51%.
 - II. Reduced opportunities for artists to perform; GMVs are open for live music 3.89 times per week, only 55% of the time
 - III. Rapidly deteriorating infrastructure that is inadequate to support the delivery of artistic excellence.
- E. As a result of the decline, entry prices have stagnated, resulting in:
- I. reduced earnings potential for artists
 - II. a downward spiral of under investment.
- F. Despite this decline, there are still circa 550 such music venues currently operating in the UK.
- G. Audience research conducted by Music Venue Trust in April 2016 formed part of the UK Music Wish You Were Here Report 2016⁸, the first time accurate tracking of activity in this sector had been attempted.
- H. Additional venue and artist research carried out by Music Venue Trust in May and June 2016 provided further information about audience attendance and performance activity related to GMVs. That research established that GMVs
- I. Have an average capacity of 316, a total capacity of 126,400 per night
 - II. Deliver 1556 shows per week, 80,912 shows per annum
 - III. Create 4,668 performance opportunities per week, 242,736 performance opportunities per annum
 - IV. 249,667 people attend every week, 12,982,667 people per annum.
- I. Based upon the above and in-depth research carried out in 2015 to 2017 by the Mayor of London and the Greater London Authority, specific to the function and operation of GMVs within London⁹, it is deduced that these 550 GMVs:
- I. Contribute circa £390million to the UK economy
 - II. Invest circa £187million per annum in talent development

⁵ <https://www.london.gov.uk/what-we-do/arts-and-culture/music/saving-londons-music-venues?source=vanityurl>

⁶ <http://www.bbc.co.uk/news/entertainment-arts-35399160>

⁷ Music Venue Trust GMV Survey 2016

⁸ http://www.ukmusic.org/assets/general/Wish_You_Were_Here_2016_Final.pdf

⁹ <https://www.london.gov.uk/what-we-do/arts-and-culture/music/saving-londons-music-venues>

- III. Support circa 9600 full time equivalent jobs.
- J. Grassroots Music Venues are the small business entrepreneurs of the UK music industry, taking exceptional risks with programming and support for new and emerging artists. This activity produces long-term significant economic outcomes for the wider industry and for the UK. In 2015, the UK Music Industry provided:
- I. Total GVA: £4.1billion
 - II. Total Export Revenue: £2.2billion
 - III. 119,020 FTE jobs.
- K. GMVs have demonstrated a strong and passionate engagement with local and regional audiences, addressing Arts Council Wales core aims; to foster an environment for the best artists and organisations in Wales to create their best work; to help valued organisations to find and develop new business models that encourage resilience and longevity, to build a place where we can find, nurture and share the best talent.¹⁰
- “Music fans that attend gigs in these grassroots venues have a voracious appetite for live music and a high percentage attend shows regularly, which not only helps build an active local music scene but also supports local talent, enterprise and business.” – UK Music, Wish You Were Here 2016*
- L. Despite the intent of Arts Council Wales’ core aims, Grassroots Music Venues receive almost no funding from Arts Council Wales or other cultural distribution agencies.
- I. Core funding to Arts Portfolio Wales organisations for 2017/18 distributed £26,744,402 to 65 organisations, out of a total funding distribution for 2017/18 of £30,904,329
 - II. Opera received £4,857,237 (15.7%) distributed to just 3 organisations. Opera was acknowledged within a specific designated category in the funding round
 - III. Music received £1,387,329 (4.49%) distributed to 6 organisations. ACW do not provide details of the 6 organisations within their report. However, their Report and Financial Statements¹¹ indicate that BBC National Orchestra (Grant of £805,133) equates to 58% of this allocation.
 - IV. No Grassroots Music Venue appears in the list of funded organisations. The distribution to those venues is therefore concluded to be 0%.
- M. Arts Council Wales have several schemes to support artists but nothing specific for grassroots music venues which are the infrastructure that support them.
- N. Across the EU, governments have provided a variety of mechanisms to subsidise and underwrite investment in Grassroots Music Venues, resulting in an average subsidy of 42% of total turnover, as high as 70% in France.¹² These initiatives have resulted in exceptional facilities in many of our neighbouring territories, with greater performance fees to artists, higher employment levels, greater numbers of apprentices and training opportunities being just some of the outcomes.¹³

¹⁰ <https://arts.wales/about-us/strategy>

¹¹ https://arts.wales/sites/default/files/2019-02/Report_and_Financial_Statements_2017-18.pdf

¹² http://www.icce.rug.nl/~soundscapes/DATABASES/MIE/Part1_chapter07.shtml

¹³ <http://www.live-dma.eu/wp-content/uploads/2016/07/Live-DMA-data-2014-survey-presentation-for-online-publication-version-18-July-2016.pdf>

- O. Wales' comparative lack of support and investment into Grassroots Music Venues is failing to compete with emerging markets and to support the development of skilled UK artists and supporting professionals, specifically those at the beginning of their careers.
- P. Examples of comparative investment in emerging markets:
- I. Arts Council England created a ringfenced funding programme to specifically address the needs of Grassroots Music Venues in May 2019, an allocation of £1.5 million in 2019/20
 - II. The German Government announced a package of investments into Grassroots Music Venues to a value of €8.2million in November 2016 (Förderprogramme zur technischen Erneuerung der Aufführungstechnik von Musikclubs).¹⁴ The programme is specifically aimed at a move to digital equipment which is high quality and reduces energy consumption and costs.
 - III. In the Netherlands, every middle-sized town or city (approx. 100.000 inhabitants) has a music venue for popular music genres. Fifty-one of these music venues receive funding from the Government following the advice of Muziek Centrum Nederland.¹⁵
 - IV. In Denmark, the Government has established an infrastructure and trading subsidy budget which has developed 19 Grassroots Music Venues of exceptionally high quality. These venues receive ongoing subsidy to create local jobs, support for musician micro-businesses, and platforms for local emerging talent – at the full subsidy rate, each of these 19 venues commits to paying each performing musician 2000 Krone, a fee equating to £250 per band member per performance.¹⁶
 - V. In Norway, The Musikkutstyrsordningen (Norwegian Musical Equipment Foundation) gives bi-annual grants to studios, venues, community groups, and rehearsal spaces for upgrading facilities and maintaining and purchasing equipment. It was established in 2009 and distributes circa 27.5 - 30 million kr per year (£2.5 - £2.8 million). Although it is a national subsidy/state funding scheme, it is governed by a General Assembly comprised of some of the key music trade bodies in Norway¹⁷.
 - VI. In France, GMVs receive operational support from: Le ministère de la Culture et de la Communication, Le ministère de la Ville, de la Jeunesse et des Sports, Le ministère de la Justice L'Union Européenne - Lifelong Learning Programme and La SACEM. Le CNV - Centre National de la chanson des Variétés et du jazz – administers two schemes by which a levy is paid by all live music events and distributed to Grassroots Music Venues:
 - i. to promote risk taking with programming at grassroots level.¹⁸ 195 venues benefitted in 2015
 - ii. to improve the infrastructure at Grassroots Music Venues.¹⁹ 59 venues benefitted in 2015.

Each of Wales' nearest geographical competitors for international touring have established programmes to support infrastructure for GMVs.

¹⁴ <http://www.livemusikkommission.de/foerderprogramme-zur-technischen-erneuerung-der-auffuehrungstechnik-von-musikclubs-starten-2017/>

¹⁵ https://en.wikipedia.org/wiki/Muziek_Centrum_Nederland

¹⁶ <http://dansklive.dk/>

¹⁷ <http://www.musikkutstyrsordningen.no/om-oss/>

¹⁸ <http://www.cnv.fr/activite-salles-spectacles-7>

¹⁹ <http://www.cnv.fr/amenagement-et-equipement-salles-spectacles-6-et-6bis>

3. Our Response to the Inquiry

- A. Music Venue Trust warmly welcomes the Call for Evidence and the opportunity to offer specific input on the crisis facing Wales' Grassroots Music Venues
- B. The closure of small music venues across the country has resulted in:
- I. Reduced access to live music experiences
 - II. Decrease in performance/earning opportunities for musicians
 - III. Decline in the number of touring dates taking place in Wales
 - IV. Decline in the number of affordable quality live music experiences
- C. These direct impacts have short and long-term implications for the UK live music industry
- I. One third (29%) of Promoters responding to the UK Live Music Census said that venue closure had an extreme, strong or moderate negative impact on their events in the last 12 months.
 - II. When asked to describe the most significant problems faced as a live music promoter, one third of respondents (34%) mentioned venues
 - III. 44% of promoters who responded to a question about the barriers that impact on putting on live music in their locale also mentioned venues. Problems and barriers included a lack of venues, cost of venues, and a lack of suitable infrastructure within the venue itself.
 - IV. 42% of promoters who responded to an open-ended question about what the (local, national and/or UK) government could do to improve the live music scene mentioned venues, 37% mentioned funding or grants; and 16% mentioned schools or education
 - V. Festival Headliners are ageing²⁰
 - VI. New artists are struggling to build audiences²¹
- D. Music Venue Trust believes strongly that the Wales' cultural sector and music industry have failed to understand the social, economic and cultural value of these spaces. We have undertaken substantial research and partnered with a range of agencies to establish a clear and evidenced picture of the strengths, weaknesses, opportunities and threats faced by Grassroots Music Venues. An inconsistent approach to what constitutes a cultural venue from the cultural sector has created a common perception that theatres, arts centres, concert halls and galleries require subsidy to operate, yet a suggestion that GMVs may require support too is regularly met with the assertion that these are commercial operations. The fact that talent developed in these spaces may in future generate significant money does not make them commercially viable when there is no connection with the future wealth. And the same principle is not applied to development of talent in other styles of music or artforms.
- E. The Call for Evidence offers the opportunity to deliver bold interventions and vitally needed support. In considering these opportunities for sensible investment and support for this sector, Music Venue Trust has considered short and long-term threats to the future competitiveness of Welsh GMVs
- F. Music Venue Trust has identified three key initiatives which would support Grassroots Music Venues:
- I. Improve the quality of audience and artist experiences through a programme of infrastructure investment
 - II. Attract Private Investment and secure long-term sustainability

²⁰ <https://www.economist.com/news/britain/21656235-why-boom-big-outdoor-music-festivals-may-not-be-sustainable-smells-middle-aged-spirit>

²¹ UK Live Music Census 2018

III. Resolve long term financial, legal and sector challenges.

Opportunity 1: Updating Infrastructure

Sound + Vision ²²: A fully developed and costed plan to improve the performance infrastructure in 101 Grassroots Music Venues in the next five years, delivering high quality in every aspect of the sound, lighting, artist and audience facilities and reducing running costs and environmental impact by converting GMVs to high quality, low impact digital equipment.

Delivery of this project would significantly boost artist and audience experiences and addresses key elements of existing Arts Council England, Creative Scotland, Arts Council Wales and DCMS policy. Sound + Vision is a fully costed five-year proposal with a total project value of £8.35million. Music Venue Trust has already secured £3.6million in matched and in-kind funding from manufacturers and music industry partners, and a fund of £1.5 million has been established in England. To deliver this project requires a total UK cash investment of £4.75million across five years and could be achieved through the creation of specific funding stream within existing Arts funding distribution and Lottery sources, without significant impact upon existing funding demand.

Alongside the capital investment programme sits an audience development package for each venue, and the development of a national apprenticeship and training programme. Full details of Sound + Vision are provided in Annex A.

Delivering Sound + Vision would support key outcomes for Grassroots Music Venues:

- I. Create 101 world class GMVs in the UK by 2023
- II. Create a national network of high quality spaces which has local and regional impact, directly engaging hard to reach audiences in disenfranchised communities - supporting business to grow and driving growth across the whole country
- III. Significantly strengthen the touring circuit and deliver high quality to new and emerging artists and the audiences which support them
- IV. Substantially reduce running costs within these venues, creating economic benefits and improving financial resilience which can directly increase payments to artists and supporting staff
- V. Increase opportunities for apprenticeships, training, mentoring, with an aim of creating 101 new apprenticeship positions across the UK by 2023
- VI. Modernising venues and increasing venue capacity - if the average capacity of venues increased, it would enable venues to sell shows at a higher capacity which would create additional income for venues from both the door and the bar.

²² <http://musicvenuetrust.com/2016/10/music-venue-trust-presents-sound-vision-2017/>

Opportunity 2: Securing Investment

A principle cause of closure of Grassroots Music Venues is the comparative financial returns from the physical bricks and mortar which house these spaces; landlords can achieve higher financial returns from alternative tenants or from conversion to residential space.

Music Venue Trust has created a ten-year plan, Grassroots Investor, which aims to acquire freehold ownership of these buildings and create a protected network of spaces – a ‘National Trust for Venues’. Grassroots Investor aligns the intent of the freehold owning landlord, Music Venue Trust, with the leaseholder or tenant, the local GMV operator, creating a supportive partnership where the aim is to maintain a thriving GMV. Music Venue Trust has established a key clause lease which will enable the Trust to provide these spaces to future tenants on the basis of that over-riding objective and has undertaken substantial discussions with key stakeholders.

Creation of a Culture & Heritage Investment Tax Relief: Based upon existing provisions contained with the Social Investment Tax Relief (SITR) and the Social Venture Capital Fund (Social VCT)²³, establishing a specific CHITR would enable MVT to create investor packages to tackle a central issue facing GMVs; the freehold ownership of the buildings.

To support schemes such as Grassroots Investor, Government should establish a new Cultural & Heritage Investment Tax Relief:

- I. Referencing directly EU GBER carve-out for state aid in relation to culture and heritage conservation (Article 53 of EU Regulation 651/2014) ²⁴
- II. Adopting social enterprise/asset lock requirement from SITR model to ensure appropriate application of tax relief incentive
- III. £5m investment limit over three-year period – in line with EIS and previously stated SITR objective
- IV. Maximum investment £20m – culture and heritage conservation is likely to involve acquisition of assets with potentially significant market value, which needs to be reflected in any investment cap
- V. Gross assets restrictions may also need to be increased from £15/16m (pre/post) to £25/30m to reflect increase in permitted investment level above
- VI. No restrictions on maximum age of company/trading activities or acquisition of existing business, assets, goodwill etc – culture and heritage conservation by definition implies long-term existing activities
- VII. Trading activities should be limited to culture and heritage as consistent with Article 53 – this may require some elements of “positive” approach to prescribing allowed activities rather than just identifying a list of “excluded activities”, although a combination of both approaches may help with clarification.

Otherwise, rules relating to the investee company should be applied in a similar vein to existing SITR and Social VCT schemes:

- I. Social enterprise / asset-lock requirements

²³ <https://www.gov.uk/government/publications/social-investment-tax-relief-factsheet/social-investment-tax-relief#social-venture-capital-trust>

²⁴ http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv%3AOJ.L_.2014.187.01.0001.01.ENG

- II. Investment capital in form of debt or equity allowed – same tax reliefs applicable
- III. Requirements in relation to non-listing, independence, control of other companies, partnerships, employees, subsidiaries
- IV. Prescribed limits on dividend distributions – per share and per year
- V. No restrictions on use of assets as collateral
- VI. Ranking of debt and equity at lowest level – but clarity on how this works in insolvency would help
- VII. No charges/security allowed on debt and “reasonable, commercial rate” cap on interest
- VIII. No pre-arranged exit or risk avoidance arrangements
- IX. Requirement to use investment funds within 2 years
- X. Payment allowed to directors and management
- XI. Annual report to be filed alongside annual accounts to provide transparency.

Similarly, rules relating to the investor should be applied in similar vein to existing SITR and Social VCT schemes:

- I. Individual but exclusions relating to employees, partners, paid directors (subject to exception)
- II. Investor not allowed more than 30% of share capital, loan capital or voting power
- III. Investment capital in form of debt or equity allowed
- IV. Same tax reliefs applicable as SITR – 30% deduction on Income Tax, CGT exemption/deferral
- V. Minimum holding period of 3 years (equity or debt).

Opportunity 3: Reviewing and Updating Policy, Regulation and Taxation

An overhaul of Government and music industry policy and approaches to this sector with the aim of achieving a light touch approach to compliance and regulation and considering supportive measures in taxation by:

- I. Further extension of the provisions on capacity within the Live Music Act 2012²⁵ to remove regulation from additional Grassroots Music Venues
- II. Clearer direction and guidance to local authorities on the intent and implementation of the Licensing Act 2003²⁶ In particular, the licensing conditions for GMVs needs to be reviewed. For example, burdensome licensing conditions are currently making it prohibitively difficult for GMVs from hosting 14+ plus shows in Wales whilst arts centres, which also have alcohol licenses, are allowed to host 14+ events. This inequality in licensing conditions needs to be addressed.
- III. Heavy handed licensing conditions are also placing exorbitant costs on GMVs' ability to run shows. For example, security costs. Licensing stipulates that 1 security personnel needs to be employed for every 100 people at a live music event. At this current rate, a 400 capacity sold out show would need to employ four security personnel at £15 an hour. For a four-hour shift that equates to £240 per sold out show.
- IV. A national review of the existing premises licences within this sector, with the aim of removing grandfather clauses and outdated practices and conditions, specifically those rendered obsolete by the Live Music Act 2012.
- V. Establish a statutory right of consultation on planning and development that impacts upon GMVs to mirror that enjoyed by theatres (Statutory consultee Theatres Trust²⁷)
- VI. Reform of Business Rates in this sector, with the aim of establishing a sector specific framework for use by the Valuation Office Agency²⁸
- VII. A review of VAT on ticketing within the Grassroots Music Venues sector to:
 - (i) clearly understand the impact on investment and talent development from taxation within the sector
 - (ii) consider the appropriate rate of taxation on small venue ticketing (with specific regard to comparison to neighbouring territories and parity with other aspects of the cultural sector²⁹).
- VIII. A review of the collection of royalties for live performances within this sector to clearly understand the impact on investment and talent development of collection agencies and methodologies within this sector, with a specific focus on identifying the use of digital collection management tools to limit administration, collection costs and eliminating minimum fees that obstruct the presentation of small scale shows.³⁰
- IX. Underpinning all the above, a drive towards achieving cultural parity with already recognised creative spaces such as theatres, arts centres, galleries, museums etc, resulting in the adoption of the term Grassroots Music Venues within cultural policies, guidance and funding.

²⁵ http://www.legislation.gov.uk/ukpga/2012/2/pdfs/ukpga_20120002_en.pdf

²⁶ <http://www.legislation.gov.uk/ukpga/2003/17>

²⁷ <http://www.theatretrust.org.uk/advice/planning>

²⁸ <https://www.gov.uk/guidance/valuation-office-agency-and-business-rates-non-domestic-rates>

²⁹ <http://www.ifpi.org/content/library/vat-brochure-gb.pdf>

³⁰

<https://www.prsformusic.com/SiteCollectionDocuments/PPS%20Customer%20Consultation/tariff-lp-consultation/prs-for-music-live-consultation-2015.pdf>

Reviewing and updating policy, regulation, taxation and working practices provides a series of 'nudge' opportunities to support GMVs which would have limited cost impact but significant outcomes. Additional work in this area is an effective intervention opportunity which can support the broader aim of cultural parity for our Grassroots Music Venues.

ANNEX A: Music Venues Alliance Wales Members

Venue	Location
Club Db	Bangor
Neuadd Ogwen	Bethesda
Hobos Music Venue	Bridgend
10 Feet Tall	Cardiff
Big Top (The)	Cardiff
Clwb Ifor Bach	Cardiff
Fuel Rock Club	Cardiff
Glee Club	Cardiff
Globe (The)	Cardiff
Live Lounge (The)	Cardiff
Moon (The)	Cardiff
Porters	Cardiff
Tramshed	Cardiff
Undertone	Cardiff
Pie Records	Colwyn Bay
Blue Bell (The)	Conwy
Patriot (The)	Crumlin
Mcleans Pub	Deeside
Pavilion Mid Wales	Llandrindod Wells
Tabernacle (The)	Llandudno
Courtyard (The)	Newport
Le Pub	Newport
Meze Lounge	Newport
Warehouse 54	Newport
Dragonfli (The)	Pontypool
Clwb y bont	Pontypridd
Rhondda Hotel	Porth
Green Rooms (The)	Rhondda Cynon Taff
Creature Sound Ltd	Swansea
Garage (The)	Swansea
Mozart's	Swansea
Pontardawe Arts Centre	Swansea

Sin City	Swansea
Uplands Tavern	Swansea

ANNEX B: Grassroots Music Venue Definition

DEFINING GRASSROOTS MUSIC VENUES (GMV) - CULTURAL AND SOCIAL ROLE

We define the cultural and social importance of a grassroots music venue (GMV) by testing its reputation, role and activity against six criteria:

1. The elephant test

Everybody in the town/borough/city thinks that is the grassroots music venue.

2. Focus on cultural activity as its main purpose and its outcomes

The venue's raison d'être is the music it programmes.

3. A pattern of relationships and specialised knowledge related to music displayed in a person/team actively seeking to programme cultural activity

An organisational focus on music. Other ancillary services (alcohol, food, merchandise) subsidiary or dependent upon music activity.

4. It takes risks with its cultural programme, and that risk taking is the ignition system of the engine that is the UK music industry.

Programs artists that deserve audiences with no expectation of direct financial reward; as a result of this loss-making activity, significant economic returns become available to the UK music industry.

5. A Beacon of Music and key generator of night time economic activity

The presence of a grassroots music venue (or venues) provides a central beacon of music activity that inspires towns/ boroughs/cities to be musical, and the absence of one causes a dearth of music activity. By programming and reputation, GMVs attract audiences who add significant value to other aspects of the night time economy (restaurants, pubs, bars, clubs, transport).

6. Plays nicely with others

Occupies an important role within its local community and is open to further networking.

A Grassroots Music Venue displays some or all of these characteristics, dependent upon factors such as location, economic climate, or seasonal variations.

DEFINING GRASSROOTS MUSIC VENUES (GMV) - ECONOMIC ACTIVITY

We use capacity, activity, employment and financial return to seek to categorise GMVs in three bands:

SMALL GMV:

- less than 350 capacity
- over 144 live music events per year, providing opportunities for more than 180 micro-businesses (bands)
- entry level musicians, some limited activity in established acts
- 3 to 10 direct FTE jobs (programming, lighting, sound, bar, security etc)
- significant number of unpaid roles/volunteers
- high running cost to capacity ratio
- little if any profit potential

MEDIUM GMV:

- 351 to 650 capacity
- over 96 live music events per year, providing opportunities for more than 144 micro-businesses (bands)
- mix of new and established acts
- 5 to 15 direct FTE jobs (programming, lighting, sound, bar, security etc)
- some unpaid roles/volunteers
- medium to high running cost to capacity ratio
- propensity to programme non-live music (such as club nights) to support live music programme
- limited potential for profit

LARGE GMV:

- 651 plus capacity
- over 72 live music events per year, providing opportunities for more than 108 micro-businesses (bands)
- programme of mainly established acts
- 10 to 20 direct FTE jobs (programming, lighting, sound, bar, security etc)
- internships and apprenticeships
- may be profitable dependent upon external factors (location, additional uses, ownership)

These bands and activities are flexible. Final definition of a GMV within these bands should include variable factors such as location, economic climate, competition, or programming.

DEFINING GRASSROOTS MUSIC VENUES (GMV) – AMENITIES & INFRASTRUCTURE

1. Has a fixed or temporary stage, or as a minimum an area defined as a stage, and exhibits at least one other structural hallmark conducive to live music, such as:

Defined audience space, sound booth, ticket hatch, sound proofing, room adapted to enhance acoustics, stage facing or elevated seating, dressing room, photo pit, external poster frames for advertising gigs, overnight band accommodation

2. Possess a mixing desk, PA system, and at least one other piece of equipment to facilitate live music, such as:

Stage monitors, lighting rig, drum kit, back line, stage microphones, stage box & snake, spare instruments, instrument consumables, signal processors, recording rig, smoke machine

3. Employs or otherwise utilises at least two of the following (they may be the same person):

Sound engineer, booker, promoter, cashier, stage manager, security personnel

4. Applies a cover charge to some live music performances and incorporates promotion within its activities, such as:

Publishes printed or electronic gig listings, issues printed tickets, utilises on-line ticketing, produces displays and distributes posters, advertises gigs involving original music via local media

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