

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.