

# **Turn up the volume:** an inquiry into the live music industry

December 2020



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# **Turn up the volume:**

## an inquiry into the live music industry

December 2020



# About the Committee

The Committee was established on 28 June 2016. Its remit can be found at: [www.senedd.wales/SeneddCWLC](http://www.senedd.wales/SeneddCWLC)

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## Committee Chair:



**Helen Mary Jones MS**  
Plaid Cymru



**Bethan Sayed MS**  
Plaid Cymru

## Current Committee membership:



**Mick Antoniw MS**  
Welsh Labour



**John Griffiths MS**  
Welsh Labour



**Carwyn Jones MS**  
Welsh Labour



**David Melding MS**  
Welsh Conservatives

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The following Member was also a member of the Committee during this inquiry.



**Delyth Jewell MS**  
Plaid Cymru

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The following Member attended as a substitute during this inquiry.



**Rhianon Passmore MS**  
Welsh Labour

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## Chairs' foreword

The pandemic has delivered a shock to the live music sector that none of us could have imagined. It is crushing for artists and audiences that live music events have been prohibited since March 2020. Mercifully, safe and effective vaccines are on their way. The Welsh and UK Governments must keep faith with the sector, providing it with the support needed to ensure we leave the crisis with as many of the venues, artists and technicians that we started it with.

A version of this report was ready for publication just as we went into lockdown in March 2020. It made sense to postpone the publication and take stock of the situation once the emerging picture had become clearer. In autumn 2020 we took further evidence to reflect the impact of the crisis. This report therefore reflects the problems the sector faced before the pandemic – none of which have gone away – and has been updated to reflect the urgent existential threat coronavirus has posed to the sector.

Welsh music is flourishing, with artists like Catfish and the Bottlemen, Boy Azooga and Cate Le Bon enjoying success at home and abroad. But small venues are closing at an alarming rate. The Welsh Government and local authorities need to take urgent action to ensure that tomorrow's stars have the small venues that they need to cut their teeth today.

The headline figures show a sector in rude health. Last year the live music sector's contribution to the UK economy grew to a record high of £1.3 billion, a 17 per cent overall rise on 2018. But the live music industry is quietly undergoing a crisis that needs urgent support from across the public sector.

Across the UK, 35 per cent of venues have closed over the last decade. We don't have specific figures for Wales, but we can all name small venues that have closed, such as the Parrot in Carmarthen, TJs in Newport and the Point in Cardiff.

On one level, small venues are cultural incubators. They are the places that artists need to hone their skills before they can headline festivals and tour internationally. The Super Furry Animals have played massive gigs and taken the Welsh language to new audiences across the world. But would this have been possible without small venues like Clwb Ifor Bach, where they could learn their craft and grow a local fanbase?

Grassroots venues are much more, though, than staging posts on the route to success. They are places for people to express themselves creatively, to meet new people and feel connected to their community. As Sam Dabb from Newport's Le

Public Space said, “I’ve watched people meet at gigs, fall in love and have children who now turn up for gigs in the pub to potentially meet the person they’ll fall in love with”.

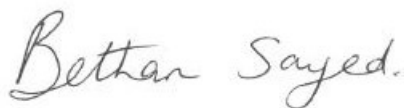
Cities in North America such as Nashville and Memphis show how music can put places on the map. Policy-makers should aim big and use Wales’s vibrant bilingual music scene – unique in the UK – to grow local economies and attract international tourists.

Playing viola and choral singing have given us opportunities to meet people, travel and express ourselves creatively. None of this would have been possible were it not for the availability of rehearsal spaces, small venues and the chance to learn an instrument at school.

In this report we recommend a range of actions to make life easier for these businesses: from rates relief to a new capital loans fund for venues under threat. It’s not just about the venues, though. We also call for talent development schemes to be strengthened and expanded across the country. The Welsh Government, the Arts Council of Wales and local authorities are all doing good work to support live music, but this action needs strengthening and coordinating through a new music strategy. The recommendations in this report provide a framework within which we hope the live music industry can recover from the pandemic, and flourish.

Our urban centres are changing, as people’s leisure, work and living habits evolve. But unlike shops, live music venues cannot go online. If live music venues close and cannot move somewhere else, they will be closed forever. The public sector – including the Welsh Government and local authorities – needs to recognise the existential threat to live music, and take action before it is too late.

This report spans the tenure of two Committee Chairs, and we are both happy to put our names to it. We are grateful to all those who took part in our inquiry and look forward to strengthening the support for this vital sector.



Bethan Sayed MS



A handwritten signature in black ink that reads "Helen Mary Jones." The signature is written in a cursive, flowing style.

Helen Mary Jones MS

## Recommendations

**Recommendation 1.** The Welsh Government and local authorities need to support live music in a way that improves geographical access across Wales. Music binds communities together, from small villages to nations. Opportunities to make and listen to music should be available across the country. ....21

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**Recommendation 15.** The Welsh Government should work with the Music Venues Trust to review the effectiveness of the agent of change planning principle. If substantial evidence is found of existing music venues being adversely effected by new developments then it should strengthen policies to protect existing venues, including considering the use of noise easements, as recommended by UK Music and the Music Venues Trust.....57

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distanced and outdoor gigs, which, although perhaps not economically beneficial, would provide much-needed cultural activity. This plan should include other cultural events, such as theatre and dance, as well as live music..... 85

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# 1. The reason for and evidence behind the inquiry

**1.** In recent years there have been a number of high-profile campaigns to save music venues that have been under threat from planned development. Some successful – such as ‘Save Womanby Street’ – and some unfortunately not, such as the campaign to save Gwdihw on Cardiff’s Guildford Crescent.

**2.** Committee Members all had examples in their constituencies of live music venues that had closed in recent years, and knew first-hand what important community assets they were. Small venues are the first rung on the ladder that artists need to grow, as well as places for people to meet and express themselves creatively in their community. Sam Dabb – manager of Newport’s Le Public Space – described the value of grassroots music venues in a recent article for Wales Arts Review:

“If we lose the small venues we eventually lose our musical identity on every level and we cannot let that happen. For every huge artist that makes a breakthrough, there are thousands of artists who don’t. And they are just as important, if not more so. I’ve watched people meet at gigs, fall in love and have children who now turn up for gigs in the pub to potentially meet the person they’ll fall in love with. I’ve seen bands play 30 gigs to 30 people and then break up. But while playing those gigs they made friends that would last them a lifetime.”<sup>1</sup>

**3.** There was no information, however, on the scale of venue closures across Wales, or indeed what the Welsh Government and others could do to help the live music sector. Evidence for this inquiry came from the following sources:

- The Committee held stakeholder sessions in the Tramshed in Cardiff and Tŷ Pawb in Wrexham;
- Committee staff attended a Sŵn festival industry event to speak to new artists;
- Committee Chair Bethan Sayed AM appeared on Minty’s Gig Guide’s podcast to discuss the live music industry;<sup>2</sup>

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<sup>1</sup> [Wales Arts Review, 9 February 2019](#)

<sup>2</sup> [Minty’s Gig Guide](#)

- A series of formal meetings in the Senedd with witnesses including venue operators, artists, third sector organisations, local authorities and the Deputy Minister for Culture, Tourism and Sport;
- Committee staff attended a popular music education symposium at the Immersed! festival organised by the University of South Wales; and
- A written consultation that received 21 responses.

To take stock of the impact of the pandemic the Committee took the following further evidence:

- An additional set of evidence sessions in autumn 2020, with venues and industry experts to assess the impact of the pandemic; and
- A report, commissioned by the Senedd's Research Service from Professor Paul Carr, comparing the response to the pandemic between Wales and other nations.<sup>3</sup>

**4.** Full details are available in the annexes to this report.

**5.** Whilst drafting this report Committee staff benefited from the input of an expert group. This group comprised of Dr Sam Murray (formerly of UK Music), Samantha Dabb (Le Public Space), Neal Thompson (FOCUS Wales) and John Rostron (co-founder of the Welsh Music Prize and former chief executive of the Welsh Music Foundation). We would like to thank them for their time and the benefit of their informed views. The views expressed in this report are, however, those of the Committee only, and are not to be taken as those of the expert group.

**6.** Throughout this work, the Committee encountered a sector brimming with passion, knowledge and energy. Many of the people the Committee heard from had not worked with the Senedd before. Members would like to thank everyone who gave up their time to speak to the Committee. This report is intended to provide an overview of the evidence received and a constructive plan for supporting and growing the live music industry.

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<sup>3</sup> Professor Paul Carr, [The Welsh Music Industries in a post-COVID world](#), 2020



## 2. The health of the sector and need for a music strategy

The only figures indicating the health of the live music sector, and the music industry more broadly, are for the whole of the UK. This absence of Welsh data makes it harder for policymakers in Wales to identify and fix problems. Many organisations do good work to support live music in Wales, but there is no strategy drawing this together. Wales needs both good data and a strategy to support and grow the live music industry.

**7.** Across the UK, the number of live music venues has declined by about 35 per cent over the last decade. Evidence from UK Music - the music industry umbrella body - evidence says:

“These closures have mainly been due to the increasing financial pressure faced by venue managers as a result of overhead costs, bills, rent and business rates, or due to planning disputes around noise.”<sup>4</sup>

**8.** UK Music cites The Music Venue Trust as reporting that the cost of delivering live music events rose by 4 per cent last year in grassroots music venues and amounts to 130 per cent of total gross tickets receipts. This means that venues are dependent on other activities – such as drink sales – to be profitable.<sup>5</sup>

### There is no clear picture of the health of the Welsh live music sector

**9.** We know that venues have closed in recent years in Wales. Indeed, the high profile campaign to save Gwdihw – the popular music venue on Cardiff’s Guildford Crescent – was one of the events that motivated the Committee to carry out this inquiry. Venue owners (including Swansea’s Sin City, Pontypridd’s Clwb y Bont, Cardiff’s Clwb Ifor Bach and Newport’s Le Public Space) described the precarious finances of grassroots venues, which mean they can be put out of business by unexpected business rate hikes or infrastructure repair costs. However, there is

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<sup>4</sup> UK Music written evidence

<sup>5</sup> UK Music written evidence

currently insufficient data to determine the distribution and health of live music venues in Wales.

**10.** In July 2019, before this inquiry started, the Welsh Government commissioned a mapping exercise of grassroots venues. This was intended to:

- establish a definition of a ‘grassroots music venue’ which is based on that of the Music Venue Trust but which is tailored to the situation in Wales;
- provide a geographical map of grassroots music venues across the whole of Wales, recording a series of information for each venue; and
- identify clusters of venues and any common characteristics.

**11.** In spring 2020, the completed mapping exercise had been provided to the Welsh Government, but it had not been published. The Deputy Minister for Culture, Sport and Tourism, Lord Elis-Thomas, explained that mapping venues will be one of the tasks of the newly-created body ‘Creative Wales’.<sup>6</sup>

**12.** Guto Brychan from Clwb Ifor Bach explained that a comprehensive map of live music venues would help in organising gigs outside of urban centres:

“one of the challenges for us in terms of organising is finding venues where we can put events on, seeing what the resources are out there, and the costs of putting events on, where we need to have additional equipment to be able to put events on, what is the target audience for that area, and how easy is it for the audience to reach those venues—that’s very valuable information for people who put events on”<sup>7</sup>

**13.** Professor Paul Carr expressed his hope that this mapping exercise would enable more collaboration between small venues:

“I’d like to think that would come through that mapping exercise, where you can start to identify the clusters and how can they work together so they’re not in competition with each other, but actually working more strategically together.”<sup>8</sup>

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<sup>6</sup> Para 12, CWLC meeting 13 February 2020

<sup>7</sup> Para 12, CWLC meeting 26 September 2019

<sup>8</sup> Para 306, CWLC meeting 2 October 2019

**14.** The Musicians' Union raised the question as to whether this mapping exercise should also include rehearsal and recording spaces.<sup>9</sup> Trac's evidence notes the absence of data on live music in Wales, and called for the Welsh Government or the Welsh Local Government Association (WLGA) to commission work to fill this gap.<sup>10</sup>

**15.** Throughout the inquiry, venue-operators, artists and industry experts were asked if they had been approached by the consultants carrying out this mapping exercise for their input. The Committee was concerned to hear that knowledgeable witnesses had not been contacted to contribute to this exercise. In October, UK Music's Dr Sam Murray told the Committee:

"none of the venues that we've spoken to have heard about this mapping either. So, we are aware that somebody's been appointed to deliver it, but we don't know what's actually happened further to that particular point."<sup>11</sup>

**16.** The Committee wrote to the Welsh Government at the beginning of December 2019 to alert them to this issue and they, in turn, passed this onto the consultants carrying out the exercise.<sup>12</sup>

## Live music is embedded in the local economy

**17.** UK Music published figures on the contribution of music to the economy in its 2020 Music By Numbers report.<sup>13</sup> This presents various indicators of the economic value of music, such as:

- The UK music industry contributed £5.8 billion to the UK economy in 2019 - up 11% from £5.2 billion in 2018.
- Employment in the industry hit an all-time high of 197,168 in 2019 - an increase of 3% from 190,935 in 2018.
- The total export revenue of the music industry was £2.9 billion in 2019 - up 9% from £2.7 billion in 2018.

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<sup>9</sup> Para 22, CWLC meeting 16 October 2019

<sup>10</sup> Music Traditions Wales (trac) written evidence

<sup>11</sup> Para 19, CWLC meeting 16 October 2019

<sup>12</sup> REFERENCE

<sup>13</sup> [Music by Numbers](#)

- In addition to the industry's direct economic contribution, music tourism alone contributed £4.7 billion in terms of spending to the UK economy in 2019 - up 6% from £4.5 billion in 2018.

**18.** The report notes that these headline statistics do not reflect the existence of many employed within the sector:

“The large numbers are not, however, indicative of the earnings for a majority of music creators. [...] According to the Office for National Statistics (ONS), annual earnings for musicians in a typical year are £23,059 – well below the national average of £29,832”.<sup>14</sup>

**19.** The only figures for Wales in this report relate to music tourism.

**20.** Mark Davyd from the Music Venues Trust explained how embedded grassroots music venues are in local economies:

“The headline statistic on that is that, for every £10 spent on a ticket in a grass-roots music venue, £17 is spent in the night-time economy on catering, beverages, transport, et cetera. And that £17 in the night-time economy is supporting people's jobs, people's businesses. We like to call grass-roots music venues destination locations, and I always talk about this in terms of kebabs. I've eaten a lot of kebabs. [...] And I've eaten those kebabs by going to a grass-roots music venue, emerging at 11 o'clock at night and thinking, 'I need to eat something.' I've never left my house at 11 o'clock at night and gone to a kebab shop. So, the question should be, whether you like kebabs or not: how many kebab shops will close when you close a grass-roots music venue? And that is just an example of that ripple economy effect.”<sup>15</sup>

**21.** Dilwyn Llwyd, manager of Neuadd Ogwen, also described how his venue was embedded in the local community and economy:

“I think economically music can have an impact, but also it has an impact in terms of people's well-being, and we create jobs for people in the community, we help other businesses in the community.”<sup>16</sup>

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<sup>14</sup> Music by Numbers

<sup>15</sup> Para 222, CWLC meeting 2 October 2019

<sup>16</sup> Para 147, CWLC meeting 30 January 2019

**22.** The changing dynamics of the music industry – namely the collapse of physical sales and move to streaming services – have seen musicians become more reliant on the income provided by live performance. Sain Records explained how the income provided to artists by recorded music had changed following the growth in online streaming:

“In the days when a band could sell 2,000 CDs at £12 each, it was possible to generate a sensible income that allowed the label or the artist to recoup the recording costs and so on. Unfortunately, the income generated from streaming does not offset the reduction in income from CD sales – despite a generally higher usage rate. This is great with regard to the use of Welsh socially, but while income from streaming remains at £0.003, a figure of 50,000 (which is high) generates an income of £150.”<sup>17</sup>

**23.** As well as income from sales and live performances, composers receive income from royalties when music is broadcast or performed by other artists. Changes in the last decade have seen reductions in royalties paid to radio stations with smaller listening figures. This led to lower royalty rates for music played on BBC Radio Cymru, and therefore a reduced income for Welsh language artists.

### There is a geographical disparity in access to live music

**24.** The Committee heard of the geographical disparity in accessing live music at the stakeholder workshops in Wrexham and Cardiff. Mark Davyd from the Music Venues Trust explained how Wales’s touring circuit had reduced during his gig-going lifetime:

“There are major gaps in Wales, and this is in, to explain, what we would call primary music touring towns. Again, when I started in this industry, in Wales, that would have included Aberystwyth, certainly, Pontypridd, probably, definitely Swansea, Newport—no doubt about it.[...]. One of my friends went to university at the Lampeter University of St David’s. Is that right? Yes. And, when I went to visit him, on offer that weekend was Orange Juice and Dr Feelgood. They don’t have any offer like that going on now.”<sup>18</sup>

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<sup>17</sup> Sain written evidence

<sup>18</sup> Para 178, CWLC meeting 2 October 2019

**25.** He felt that this restriction of access to culture meant that the Welsh Government was failing to meet its duties under the Well-being of Future Generations (Wales) Act 2015:

“A young person in Newtown is nowhere near a live music opportunity. They have nothing to inspire them to write their own songs; they have no ability to go and see new and emerging bands. You don’t have a transport system that would get them to the nearest available thing and get back again before they have to be back at home for whatever. So, I think that’s your headline: how are we going to meet the fantastic work that you’re doing around the future generations Wales Act, which is so progressive and so important? Failure to access culture impacts on every pillar of that. Every pillar of that is about health and well-being.”<sup>19</sup>

**26.** Alun Llwyd from PYST described how, despite music being available more globally through the use of streaming services, this had coincided with a reduction in opportunities to access to live music locally:

“They have declined virtually into the areas of the north west, Caernarfon and also Cardiff. They’ve disappeared from Clwyd, Powys, parts of Gwynedd and west Wales. There are problems; it’s not just a lack of venues, but a lack of promoters. If someone actually removes that opportunity to play live—that is usually the first step for young artists in developing their craft. So, that would be my greatest concern at the moment.”<sup>20</sup>

**27.** DJ Ryan Peak described the challenges of running electronic music nights in north Wales. He said:

“I used to play for a night called Strictly Underground and it really created the boom around north Wales - there was 3 clubs open at the time with loads of little venues around Bangor, sadly these days there is only one public club and the other being student based and rarely open to non-students. We have no little venues left.”<sup>21</sup>

**28.** As well as geographical barriers to access, viewers of Minty’s Gig Guide’s Facebook Live conversation with the Committee Chair raised the issue of high ticket prices to events at larger venues, such as the Principality Stadium in Cardiff.

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<sup>19</sup> Para 175, CWLC meeting 2 October 2019

<sup>20</sup> Para 4, CWLC meeting 30 January 2020

<sup>21</sup> Ryan Howard written evidence

Disabled access was also cited as a barrier to seeing live music, especially in smaller venues.<sup>22</sup>

## There is no strategic oversight for live music in Wales

**29.** A variety of organisations are working to improve the live music industry in Wales. The Arts Council of Wales distributes Welsh Government and National Lottery funding, including revenue-funding organisations such as Trac, and grants for artists, venues and festivals. The Welsh Government commissioned a mapping exercise of Wales’s venues, and has recently established Creative Wales to develop the creative industries. Cardiff Council has recently setup a music board to advise it and help to develop a music strategy for the city. Charities – such as Music Venues Trust – provides advice to venues. These disparate pieces of work do not currently feed into an overarching live music strategy for Wales.

**30.** Shane Shapiro, CEO of music consultancy Sound Diplomacy, said that support for live music was “very piecemeal and ad hoc”, and “to be honest I don’t think Wales has a music policy”.<sup>23</sup>

**31.** Trac’s evidence called for the creation of such a strategy:

“Where Government can lead is to create a music strategy for the country developed by a wide range of stakeholders; achieve a broad consensus of goals and sufficiently resourced to achieve them.”<sup>24</sup>

**32.** Andy Warnock from the Musicians’ Union hoped that Creative Wales could develop a music industry strategy:

“At the moment there’s a bit of a gap really in how music is pulled together, and so I’d hope that that’s something that Creative Wales is going to look at, in terms of a strategy for the music industry and how you tie things together.”<sup>25</sup>

**33.** Spike Griffiths from the Forté Project and Young Promoters’ Network called for greater coordination in the sector:

“There’s a lot of work in silos and there are a lot of organisations who sometimes are doing the same thing. They’re competing against each

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<sup>22</sup> Minty’s Gig Guide

<sup>23</sup> Shain Shapiro written evidence

<sup>24</sup> Music Traditions Wales (Trac) written evidence

<sup>25</sup> Para 45, CWLC meeting 16 October 2019



other and not sharing good practice or ideas. So, if there could be a space where there could be some unlocking of some of those problems, then that can only be a good thing.”<sup>26</sup>

**34.** A number of witnesses said how crucial it was that a new music strategy was developed by the industry itself, rather than imposed by government. Alun Llwyd from PYST said that “it’s vital that the strategy is led by experts, or people who work on a daily basis in that sector”.<sup>27</sup> He also said that currently the different bodies supporting live music were “meddling” and that “clarity” was needed.<sup>28</sup>

**35.** Neal Thompson – who runs Wrexham’s FOCUS festival – described the amount of activity in Wales’s live music industry, and the potential this had to grow with the right strategic focus. “We’ve got an opportunity to begin to develop, from the grassroots up,” he said, “a real music industry for Wales. He described the current activities taking place that he felt “form more of a patchwork of things that we need to knit together a bit better”.<sup>29</sup> He stressed that Government support should be used to enable people working in the industry, rather than civil servants replacing or replicating this work themselves.

**36.** Sain Records stressed that a strategy for the whole music industry was needed, not just one looking at live music:

“I am strongly of the opinion that one of the main deficiencies of the music industry in Wales is the fact that the Government does not have a comprehensive strategy that takes into consideration the industry in its entirety. By looking at one part of it, such as ‘live music’, the Government’s piecemeal action will continue.”<sup>30</sup>

**37.** The Deputy Minister for Culture, Sport and Tourism Lord Elis-Thomas was asked if Creative Wales would develop a music strategy. He explained:

“I’m not a fan of the word ‘strategic’. I prefer to focus on operational programmes and priorities, and we have announced various priorities in the various portfolio areas that I’m responsible for, and that will be the process that we will follow here, but the priorities will be drawn up in this case by Creative Wales in partnership with Government, and

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<sup>26</sup> Para 133, CWLC meeting 6 November 2019

<sup>27</sup> Para 79, CWLC meeting 30 January 2020

<sup>28</sup> Para 57, CWLC meeting 30 January 2020

<sup>29</sup> Para 15, CWLC meeting 30 January 2020

<sup>30</sup> Sain written evidence

they will be clear to everyone within the sector. Everything will be developed on the basis of partnership”<sup>31</sup>

**38.** Creative Wales Deputy Director Gerwyn Evans said:

“The priority now for Creative Wales is to set up an industry-led music working group, where we bring all key players from all different parts of the music industry to work with us to develop an action plan.”<sup>32</sup>

## Music plays a valuable role in Welsh language promotion

**39.** A number of witnesses – such as Sain Records – discussed the role that live music can play in helping to promote Welsh language use. Alun Llwyd – who works with music agency PYST – said that “there’s a strong argument for having bilingual gigs” in less Welsh-speaking areas.<sup>33</sup> Neal Thompson – who runs international showcase festival FOCUS Wales – said that “the whole point” of his festival “was to present Welsh and English-language music in parity, with no segregation”.<sup>34</sup>

**40.** The Mentrau Iaith are voluntary and community-based movements which promote the use of the Welsh language. They told the Committee that the annual Welsh Language Music Day is “an exciting development which has grown over recent years”, but that that “a legacy needs to be created for it via local projects which creates opportunities 12 months of the year for people to learn to perform, promote and arrange events”.<sup>35</sup>

**41.** Marged Gwenllian, from the band Y Cledrau, described the rare occasions she had been involved in bilingual gigs – such as through FOCUS – as being “fresh and healthy”.<sup>36</sup>

**42.** Alun Llwyd noted the success of Welsh language band Alffa, who have had over 3 million streams on Spotify:

“And I think the success of things like Alffa on Spotify does show that there’s been a normalisation of the Welsh language to a great extent,

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<sup>31</sup> Para 177, CWLC meeting 13 February 2020

<sup>32</sup> Para 15, CWLC meeting 13 February 2020

<sup>33</sup> Para 21, CWLC meeting 30 January 2020

<sup>34</sup> Para 23, CWLC meeting 30 January 2020

<sup>35</sup> Mentrau Iaith written evidence

<sup>36</sup> Para 153, CWLC meeting 30 January 2020

and that the Welsh language can take its place on platforms such as that without linguistic considerations being an issue. And we need to carry on with that spirit, and say ‘Well, why not put Welsh and Welsh music in contexts where it’s not been in the past?’ And I think that’s important in terms of expanding the audience.”<sup>37</sup>

## Our view

During this inquiry we heard lots of positive comments about action to support live music taking place at all tiers of government, and in the third sector, not to mention the hard work and passion of those running venues and performing.

At a Wales-wide level we need two things to make sure that this work all pulls together to support live music. We need **good data** to tell us what resources we currently have, and how this is changing over time. This will enable better collaboration and targeted support. We know that venues have closed – we need data to assess the scale of the problem and identify common causes that can then be addressed.

We are disappointed that those running the Welsh Government’s venue mapping exercise did not engage better with the sector. We encountered an industry brimming with knowledge and enthusiasm: any public sector initiative to support live music needs to tap into this valuable resource. The fact that this mapping exercise has not been made public, over a year since it was commissioned, suggests that our initial concerns over how this work was conducted were correct.

We are pleased that the Welsh Government intends venue mapping to be a task that will be regularly undertaken by Creative Wales. This work should be expanded to include other important musical infrastructure, such as rehearsal spaces.

Even without good data, it is clear that there is **geographical inequality in access to live music**. A common complaint the Committee heard was that touring bands often overlook Wales, or perhaps play one show in Cardiff. This did not used to be the case. Recreating a vibrant touring circuit in Wales needs venues for artists to play in and audience members to attend. The many recommendations we make in this report are designed to improve both of

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<sup>37</sup> Para 22, CWLC meeting 30 January 2020

these things. The Welsh Government and local authorities need to support live music in a way that improves geographic access across Wales.

**The difficult financial situation faced by venues restricts the diversity of music on offer.** With event organisers struggling to make ends meet, ticket sales become the over-riding imperative. The recommendations we make in this report are designed to improve the financial sustainability of the live music sector, which can then programme a more diverse range of events.

High ticket prices at larger venues are a barrier to access for people on lower incomes. All artists that play these gigs will have started in grassroots venues. **Companies arranging events with expensive tickets should consider how they are contributing to the grassroots live music sector** that they are the beneficiaries of. This could include contributing a proportion of their ticket income to organisations that support grassroots music. One way to do this would be through providing customers with the option of rounding up ticket prices to the nearest pound when purchasing tickets, with the surplus provided to appropriate charities. They could also consider providing concessionary tickets to people on low incomes.

We need a **music strategy for Wales**. This is necessary to ensure the various agencies involved work together so that the sum of their activities is greater than their individual parts, as well as to spot and mitigate any gaps in support that exist. The Welsh Government, as the primary funder of activity in this area, is the natural body to develop this strategy, though again we stress that this must be developed in collaboration with the industry and other stakeholders involved. Where possible, this strategy should enable experts within the industry to increase their activity, rather than producing more work for civil servants.

The case for a music strategy has only been strengthened by the pandemic, which we discuss later in the report. Relationships between the public and private sectors born from the pandemic should be used to guide the industry's recovery and growth.

In our previous inquiry into film and major television production we noted an absence of central coordination, and called for a strategy for the screen industry. The evidence is building for an overarching culture strategy. As the Director of the National Museum told us in 2019, we believe that “the planets are now aligned for there to be a **culture strategy for Wales**”.

Despite the headline growth in the music industry, it is worth noting that musicians earn significantly less than the average Welsh salary. This means that

public investment in the sector is unlikely to have the sort of headline economic returns that have been associated with, for example, Welsh Government investment in film productions. There is, though, a social and cultural imperative for investing in live music: this activity is important, and as a society we would be worse off without it. Also, activity in grassroots music venues often generates profits that are spent locally. Investment in this area therefore fits well with the Welsh Government's move towards supporting the foundational economy.<sup>38</sup>

We heard of the important role that Welsh language music events and festivals have in the promotion of the language. **In addition to the development of Welsh language events we heard that programming bilingual gigs** is a great way to expose new audiences to the Welsh language and further normalise its use. Public funders should tailor the support they provide to the industry to encourage people to provide some Welsh language music at predominantly English language gigs. Creative Wales should work to bring different language and genre communities together to encourage collaboration. This might mean including as a grant requirement that performances take place in both English and Welsh.

Attracting a wider audience to Welsh language music and encouraging bilingual gigs can boost the uptake and learning of the language. The Welsh Government should set out how live music can form part of their Cymraeg 2050 strategy to deliver one million Welsh speakers by 2050.

**Recommendation 1.** The Welsh Government and local authorities need to support live music in a way that improves geographical access across Wales. Music binds communities together, from small villages to nations. Opportunities to make and listen to music should be available across the country.

**Recommendation 2.** The Welsh Government needs to ensure that specific Welsh data is available on the size of the music industry and its various sub-sectors. This data should underpin the development of a music strategy.

**Recommendation 3.** The Welsh Government should publish the results of its venue mapping exercise and conduct a mapping exercise of venues and other music facilities (such as rehearsal and public performance spaces) on a regular basis. This should be updated to respond to new developments.

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<sup>38</sup> <https://gov.wales/foundational-economy>

**Recommendation 4.** Public funders should tailor the support they provide to the industry to encourage people to provide some Welsh language music at predominantly English language gigs. Creative Wales should work to bring different language and genre communities together to encourage collaboration.

**Recommendation 5.** Creative Wales should work with large music venues to consider how they can use ticket sales to raise income for initiatives to widen access to music. One way to do this would be through providing customers with the option of rounding up ticket prices to the nearest pound when purchasing tickets, with the surplus provided to appropriate charities.

**Recommendation 6.** The Welsh Government, in collaboration with the industry and other stakeholders, should develop a music strategy. This should include a clear approach and brand for presenting music from Wales outside of Wales.

### 3. Support and advice: there is a gap in support for live music

The live music industry currently falls into a gap between the artistic support offered by the Arts Council, and the commercial support that may be offered by the Welsh Government through Creative Wales in the future. The Welsh Government should ensure that enhanced support and advice is available to the live music sector. The Committee supports the Welsh Government's recently-announced funding for grassroots venues. The Welsh Government should now establish a capital funding scheme to secure the future of culturally-important venues under threat.

#### Arts Council of Wales support

**43.** The Arts Council of Wales (ACW) is the main body that supports the arts, including music, in Wales. It is an independent charity that distributes funding from the Welsh Government and National Lottery. The Welsh Government sets out what it would like the Arts Council to do with its funding in an annual remit letter. The bulk of the Arts Council's funding passes through it en route to organisations and individuals that it funds on either a regular or one-off basis.

**44.** The Arts Council also provides one-off grants for individuals and organisations. This includes festivals, such as Green Man in the Brecon Beacons, and capital funding for the redevelopment of Clwb Ifor Bach. Since 2011 the Arts Council has had a dedicated funding stream for festivals. In its evidence, it raises the concern that “many of the festivals in Wales” rely “on public funding to exist”.<sup>39</sup> It also has a Music Industry Development Fund, which Sain Records said “can benefit some artists a great deal”.<sup>40</sup> A breakdown of what artforms Arts Council of Wales funding supported in 2018-19 is shown as an Annex to this report.

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<sup>39</sup> Arts Council of Wales written additional evidence

<sup>40</sup> Sain written evidence



**45.** **Tŷ Cerdd and BBC Cymru Wales** both distribute Lottery funding for music on behalf of the Arts Council. In 2018-19 Tŷ Cerdd distributed £76,000, including funding for new music commissions, youth funding, programming Welsh music, music in communities, and composers in residence. BBC Cymru Wales distributed £35,000 of funding as part of the Horizons programme for 12 up-and-coming musical artists.

**46.** The Arts Council's **Night Out** programme provides financial assistance to help community groups host artistic performances, often in buildings that are not dedicated venues. ACW told the Committee it is working with PYST (a music digital distribution and development agency) to see how music can be promoted further through Night Out.<sup>41</sup>

**47.** In 2017 the Arts Council announced Anthem, a **music endowment fund** which it hopes will be providing musical opportunities for young people from 2020. The Welsh Government provided funding to help with start-up costs and seed funding.

**48.** Since 2012, the Arts Council of Wales have had a Lottery funding strand dedicated to contemporary music – the **Music Industry Development (MID) fund**. This funding strand is open to any organisation or individual involved in music – musicians, bands and music organisations, including venues, promoters, managers, labels and publishers.

**49.** When asked by the Committee how much of its Music Industry Development Fund had gone to venues, an official from the Arts Council of Wales said they did not know, and that though “It was a scheme open to music venues [...] actually, probably very few have come through the scheme to apply for it, and I don’t know the rationale for that”.<sup>42</sup>

## Capital funding

**50.** In 2019-20 Arts Council England had a ring-fenced budget of £1.5 million of capital funding for the grassroots music sector. If similar funding was provided in Wales, based on relative populations, this would be an annual figure of £83,000.

**51.** Following discussions in the Committee about the establishment of capital funding scheme for venues in Wales, the Welsh Government announced

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<sup>41</sup> Arts Council of Wales written evidence

<sup>42</sup> Para 51, CWLC meeting 2 October 2019

£120,000 of funding for grassroots music venues. This scheme will offer small grants of up to £5,000 for capital improvements for venues.<sup>43</sup>

## The demise of the Welsh Music Foundation

**52.** The Welsh Music Foundation (WMF) – which had its £160,000 a year funding stopped by the Welsh Government in 2014 – used to provide advice and support to develop the Welsh music industry.<sup>44</sup> John Rostron – who was chief executive of the WMF – described to the Committee the range of support it used to provide:

“in the last year of Welsh Music Foundation, there were nearly 2,000 enquiries that came in, and enquiries range from things like, ‘I’ve recorded an album. What do I do?’, to, ‘How do I get a session musician?’, or ‘I want to be a manager’, or ‘I’m a manager, but I’m also working in a pizza shop and how do I juggle—?’ And you would deal with each one of those in different ways and if there were clusters of issues—. And that was always key; you’d see something emerging. PRS was a great example. As an artist is moving from recording to getting airplay, understanding PRS, we would run workshops—with PRS sometimes—to help them learn how to—. They would sit in the sessions and actually log in and register and then begin to collect their revenue. So, we would run—I think, in the final year, we ran 36 bespoke training sessions. So, that bit is also missing right now.”<sup>45</sup>

[...]

There is a development agency for music in Yorkshire. So, Yorkshire have what I’m talking about for Yorkshire; we don’t have one for Wales.”<sup>46</sup>

**53.** Spike Griffiths told the Committee:

“When the Welsh Music Foundation closed, my inbox rocketed overnight and I couldn’t deal with all these young people on my own. I just couldn’t physically get to them, I couldn’t meet them.”<sup>47</sup>

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<sup>43</sup> <https://gov.wales/new-priorities-support-growth-wales-creative-industries>

<sup>44</sup> <https://www.bbc.co.uk/news/uk-wales-28108515>

<sup>45</sup> Para 33, CWLC meeting 6 November 2019

<sup>46</sup> Para 34, CWLC meeting 6 November 2019

<sup>47</sup> Para 154, CWLC meeting 6 November 2019

## Support for the sector

### The role of the Arts Council of Wales

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**54.** Mark Davyd from the Music Venues Trust described the current absence of support for the sector, saying:

“This is not solely a problem for Government and this is not solely a problem for the music industry. It’s a problem for the culture sector, everything. Everybody needs to really swing behind this idea of the importance of these venues”<sup>48</sup>

**55.** He described his views of the Arts Council of Wales as “almost entirely negative”, but that this was typical of the sector:

“We have a 60-year history, now, of rock and popular music, but the institutions that are the gatekeepers to public funding have not responded to the changing agenda and the changing circumstances of that industry in a flexible way. So, we have not created funding streams or support—technical support or advocacy support—within those cultural institutions, and Arts Council of Wales would be one of those.”<sup>49</sup>

**56.** John Rostron described the Arts Council’s Music Industry Development fund as “really innovative” and “pioneering”, noting that it was launched at a time when the Welsh Music Foundation was set to lose its funding.<sup>50</sup> He raised the question as to where support for live music ought to fall in Wales, given that it straddles the worlds of commerce and art, stating:

“If I was chief executive of the Arts Council, I would maybe be asking, to start with, ‘Is it our remit?’ Like I articulated, these are commercial spaces. Actually, a lot of the companies that we’re talking about—Le Public Space and Clwb Ifor Bach are the exceptions; they’ve had the resource or the nous to become not-for-profit. Most of the other ones that you had in, like you had Sin City and Clwb y Bont, they’re commercial operations; the very nature of their governance would mean that they would be ineligible, or that would be the first hurdle. And then, if they were to apply—because they could apply as a commercial entity, but they’ve got to think about a not-for-profit, a

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<sup>48</sup> Para 181, CWLC meeting 2 October 2019

<sup>49</sup> Para 186, CWLC meeting 2 October 2019

<sup>50</sup> Para 36, CWLC meeting 6 November 2019

charitable project. And these are things that, if you work in funding, you understand, but if you're busy trying to run a venue—and you've got to remember, these people, they run the bricks, the mortar, the staff, they market, they do the whole lot—it's another skill set to bring in.”<sup>51</sup>

**57.** He noted that if the Arts Council were to be formally tasked with responsibility for live music, it ought to be “resourced to do so”.<sup>52</sup>

**58.** When asked if they support live music venues, the Arts Council told the Committee:

“If we're talking about grass-roots music venues, generally because they're private businesses, we generally don't support those kinds of organisations. But having said that, we are supporting the developments at Clwb Ifor Bach, for instance, with their expansion programme.”<sup>53</sup>

**59.** When asked as to whether the Arts Council should provide further support for live music, they cautioned that:

“Some people would take it as us stepping on the commercial sector's toes when we are primarily a public sector organisation”<sup>54</sup>

**60.** Marged Gwenllian from the band Y Cledrau called the Arts Council's Night Out scheme “excellent”:

“...because it demonstrates that an evening isn't for profit; it's for pure entertainment. So, it's to cover the costs of bands, and ensure that bands receive a fair wage for what they do, and then, they receive funding at the end to hold the next event.”<sup>55</sup>

**61.** Andrew Hunt from the band Buffalo Summer described a situation in which he was turned down for Arts Council funding. His band were looking to tour America with an established band, to an audience of 5,000 a night. He said that the Arts Council:

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<sup>51</sup> Para 41, CWLC meeting 6 November 2019

<sup>52</sup> Para 42, CWLC meeting 6 November 2019

<sup>53</sup> Para 36, CWLC meeting 2 October 2019

<sup>54</sup> Para 70, CWLC meeting 2 October 2019

<sup>55</sup> Para 167, CWLC meeting 30 January 2020

“...explained to me that they only will give funding if it’s what’s called a showcase event. So, the example they gave was an event in Texas called South by Southwest. There, you’d be playing a one-off show.”<sup>56</sup>

**62.** Rhydian Dafydd of the band The Joy Formidable said that this was:

“...a shame, because that genuinely could be a career changer, couldn’t it? Because you’re playing multiple cities, more so than maybe doing the one show.”<sup>57</sup>

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### Is a new source of advice and support needed?

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**63.** In a blog post in February 2019, John Rostron called for an agency to be set up “to support and oversee all areas of music in Wales”. He says that “the plight of venues across Wales has demonstrated that there’s a huge gap in support for music in Wales”. This should, he thinks, receive £3 million a year as “that’s a little under what the Welsh Books Council gets to support the development of publishing and literature in Wales”.<sup>58</sup> The Welsh Books Council received £3.9m from the Welsh Government during the 2018-19 financial year.

**64.** At a Committee meeting he expanded on his proposals for this new agency, describing what he felt was a gap between the artistic support that is currently offered by the Arts Council, and the commercial support that may be offered by Creative Wales in the future. He suggested that both bodies should direct funding to a new music agency, which could cover music that does not have a high commercial potential, but is potentially performed in venues with a commercial – if not highly profitable – focus.<sup>59</sup>

**65.** Spike Griffiths said that there was “definitely” a need for a new music agency to provide support and advice. He said it would be useful, both for himself and the artists he works with “to have somewhere to go and somewhere as a sounding board and some sort of direction”.<sup>60</sup>

**66.** This view was supported by Neal Thompson from FOCUS. He said that:

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<sup>56</sup> Para 251, CWLC meeting 22 January 2020

<sup>57</sup> Para 252, CWLC meeting 22 January 2020

<sup>58</sup> What can be done to support music venues in Wales?

<sup>59</sup> Para 27, CWLC meeting 6 November 2019

<sup>60</sup> Para 153, CWLC meeting 6 November 2019

“Maybe there’s also a need for some kind of overarching body [...] that could exist to answer questions and signpost and field and manage entry-level enquiries. [...] So, kind of what Welsh Music Foundation used to do.”<sup>61</sup>

**67.** Neuadd Ogwen’s Dilwyn Llwyd supported calls to establish a new source of support and advice for live music. “I’ve been organising events for 30 years”, he said, “and I wouldn’t know where to seek funding [...] It’s a great struggle to actually find information”.<sup>62</sup>

**68.** Contributors to Minty’s Gig Guide’s Facebook live session with the Committee Chair suggested that there should be a better source of gig listing information so that audiences knew what was happening across the country. One suggestion was that an open-source platform could be developed, with a small amount of pilot funding.<sup>63</sup>

## Funding

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**69.** When the Committee discussed the music capital funding scheme operating in England, witnesses responded positively to the question as to whether a similar scheme should be rolled out in Wales. On 29 January 2020, the Welsh Government announced £120,000 of funding for grassroots music venues. This scheme will offer small grants of up to £5,000 for capital improvements for venues.<sup>64</sup>

**70.** Most of the evidence gathering for this inquiry took place before this announcement. Neuadd Ogwen’s Dilwyn Llwyd told the Committee that “the potential of that £5,000, or less, that we’re bidding for, could have a huge impact on the venue that I work at”.<sup>65</sup>

**71.** Music Venues Trust’s written evidence states that grassroots music venues receive “almost no funding from Arts Council Wales or other cultural distribution agencies”, and notes that the Arts Council of Wales has “several schemes to support artists but nothing specific for grassroots music venues and the infrastructure that support them”. It notes Arts Council England’s capital funding scheme for music venues and says that “Each of Wales’ nearest geographical

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<sup>61</sup> Para 39, CWLC meeting 30 January 2020

<sup>62</sup> Para 165, CWLC meeting 30 January 2020

<sup>63</sup> [Minty’s Gig Guide](#)

<sup>64</sup> <https://gov.wales/new-priorities-support-growth-wales-creative-industries>

<sup>65</sup> Para 173, CLWC meeting 30 January 2020

competitors for international touring have established programmes to support infrastructure for GMVs (Grassroots Music venues)". It describes a variety of support available for grassroots music venues in other European countries, and calls for investment in Wales's venues.<sup>66</sup>

**72.** In a meeting with the Committee, Mr Davyd, Music Venues Trust chief executive, advocated for "a funding stream that is specific to venues, which recognises that venues have specific problems in areas like investment in infrastructure".<sup>67</sup> He suggested that this should be based on Arts Council England's scheme, but with a more accessible application process. When the Welsh fund was launched, he said:

"The new fund is clearly laid out with a simple application process which means that members of the Welsh Music Venues Alliance will be able to respond to this great opportunity quickly, securing money they badly need to improve both artist and audience experiences, while making their own operations more sustainable."<sup>68</sup>

**73.** The Musicians' Union calls for the Welsh Government to:

"explore how best to provide support and funding for existing and new venues, particularly in relation to grassroots music venues and options for taking live music venues into community ownership, without stretching the ACW budget further"<sup>69</sup>

**74.** Sain Records calls for investment in:

"...a circuit of venues, and then a budget to promote initial events/performances adequately to develop the audiences for each venue. This is more relevant for Welsh language artists."<sup>70</sup>

**75.** Andrew Walton – who performs as the Welsh Whisperer – described his experience of performing Welsh language music in rural venues, which are often village halls. He explained that the production values could be quite low, and that financial support – including for sound equipment, lighting equipment and

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<sup>66</sup> Music Venues Trust written evidence

<sup>67</sup> Para 187, CWLC meeting 2 October 2019

<sup>68</sup> <http://musicvenuestrust.com/2020/01/boost-for-welsh-grassroots-music-venues-as-creative-wales-announce-new-fund/>

<sup>69</sup> Musician's Union written evidence

<sup>70</sup> Sain written evidence

promotion – would improve the audience experience significantly.<sup>71</sup> Alun Llwyd from PYST also described the additional costs involved in staging concerts in rural places caused by the need to bring in equipment.<sup>72</sup>

**76.** Mr Llwyd noted that the Welsh Government’s grassroots venues fund would only help places where venues currently exist. He said:

“The investment, in terms of advice and funding, should be in developing new promoters, because in having promoters, then those promoters will find new venues in their own communities and then that fund can kick in. So, if we have promoters on the ground, then they’re going to create the venues, and I think that’s how we should look at it, rather than the other way around.”<sup>73</sup>

**77.** A panel of artists discussed the shortage of rehearsal spaces outside of the urban centres, and called for financial support to run rehearsal spaces in deprived areas. Andrew Hunt, from the band Buffalo Summer, suggested that venues that are quiet during the week could be used as rehearsal spaces.<sup>74</sup>

**78.** A number of witnesses noted the benefits of multi-functional venues, which offered more than just somewhere to drink and watch music. Spike Griffiths said:

“maybe the functionality of a venue needs to change as well. If we talk of bigger venues, we can’t just think they’ll be grand cathedrals. We need to think of them, maybe, as multi-purpose. And there are some really good examples of that. Somewhere like Tŷ Pawb in Wrexham is a good multi-purpose space, has a lot of dynamic things going on. If you look across the water, somewhere like the Oh Yeah centre in Belfast—again another space in which there’s a lot of music business start-ups there as well as a venue as well, as well as recording, as well as a guitar-repair shop; there are a lot of things.”<sup>75</sup>

**79.** Neuadd Ogwen is an arts centre in Bethesda that hosts live music and, as manager Dilwyn Llwyd told the Committee, “is much more of a community centre as well”. He explained:

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<sup>71</sup> Para 240, CWLC meeting 16 January 2020

<sup>72</sup> Para 49, CLWC meeting 30 January 2020

<sup>73</sup> Para 47, CWLC meeting 30 January 2020

<sup>74</sup> Para 350, CWLC meeting 22 January 2020

<sup>75</sup> Para 113, CWLC meeting 6 November 2019



“We’ve had funding to develop that venue to fit into a more contemporary model.[...] I think that music can just be part of a wider structure. It works for us; I can’t speak for other venues. I think that there are many such buildings across Wales that could be developed in that same way.”<sup>76</sup>

**80.** He also said that “venues can be a source of revival, for towns, villages and cities in Wales”.<sup>77</sup>

### Public ownership of grass roots venues

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**81.** In its written evidence, Music Venues Trust explain that:

“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.”<sup>78</sup>

**82.** Music Venues Trust describes its plan to combat this threat by acquiring freehold ownership of venues, and leasing these to the tenants. It describes this as “a protected network of spaces – a ‘National Trust for Venues’”.<sup>79</sup>

**83.** PYST’s Alun Llwyd endorsed the idea of taking venues into public ownership when they are under threat. He told the Committee:

“I think there’s a strong argument for looking at whether it makes sense to have a series of venues across Wales funded publicly, because those venues could then offer space for mentoring and for skills development, and then they could become arts centres in their communities.”<sup>80</sup>

**84.** A number of Welsh Government activities offer precedents for providing funding for property so that socially beneficial activity can take place there. The Welsh Government has owned premises which it lets at preferential rates to start-

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<sup>76</sup> Para 157, CWLC meeting 30 January 2020

<sup>77</sup> Para 157, CWLC meeting 30 January 2020

<sup>78</sup> Music Venues Trust written evidence

<sup>79</sup> Music Venues Trust written evidence

<sup>80</sup> Para21, CWLC meeting 30 January 2020

up businesses. This concept of “business incubators”<sup>81</sup> is, to an extent, analogous to a proposal for the Welsh Government to own cultural spaces which it lets to venue operators at preferential rates to provide a space for performers to develop their talents.

**85.** The Welsh Government has also provided funding for property to enhance the foundational economy. Rhondda Housing has acquired the old Co-op site in the Tonypany, which it says “will see us investing to improve this area, giving local people a vibrant town centre to be proud of, creating jobs and building community co-operation”. This project used £100,000 from the Welsh Government’s Foundational Economy Challenge fund.<sup>82</sup>

**86.** Green Man called for funding to be designed in a way that it complements the skills needed to succeed in the industry, rather than “a subsidy-based system designed to simply use public funding to pay for artists to have performance experience.” It said:

“Funding is best placed with the artists, promoters and venues that can illustrate a robust history of generating ticket sales, and identifying music talent that has achieved commercial success”.<sup>83</sup>

## Our View

The closure of the Welsh Music Foundation has clearly left **a gap in terms of support and advice for the music industry**. We heard that the sector currently falls into a gap between the artistic support offered by the Arts Council, and the commercial support that may be offered by Creative Wales in future.

Though we heard positive comments about the Music Industry Development fund, which was a timely intervention by the Arts Council of Wales, we are not convinced that the Arts Council currently has the expertise needed to support the live music industry in a substantive and strategic fashion. We are concerned that the Arts Council has not gained the confidence of the sector. The lack of awareness from venue operators that they could apply to the Music Industry Development fund is telling: the Arts Council must do more to engage with the live music sector.

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<sup>81</sup> [www.southwales.ac.uk/alumni/your-community/news/2019-news/usw-opens-business-incubator-cardiff-campus/](http://www.southwales.ac.uk/alumni/your-community/news/2019-news/usw-opens-business-incubator-cardiff-campus/)

<sup>82</sup> [www.rhawales.com/news-events/rha-secures-economy-futures-funding/](http://www.rhawales.com/news-events/rha-secures-economy-futures-funding/)

<sup>83</sup> Green Man written evidence

The music industry should be supported with a source of advice on anything from planning and licensing issues, to understanding Performing Rights Society (PRS) issues for artists. Devolution means that policy difference between the UK nations in important areas like planning, business rates and the arts is likely to grow, increasing the need for a specific Welsh source of support. The widespread confusion in the sector about whether a recent cut to English business rates would apply to Welsh venues (see chapter 5) demonstrated the need for a distinct source of advice in Wales.

How the venue operator is constituted (for example, whether it is a not-for-profit organisation or charity) determines the funding and support it can receive. Music venue operators would benefit from having business advice, including on how they should be structured. This support would be similar to that provided by the Arts Council of Wales through its Resilience programme.

Although our work has focused on the live music industry, we see no reason that artists and labels would not also benefit from advice on issues relating to recorded music. The **Welsh Government needs to ensure that there is enhanced support and advice available for the music industry**. This support needs to be available across Wales and at a grassroots level, where intervention is often most needed.

Given the relatively recent launch of Creative Wales, it is too early to recommend the establishment of a new music agency, though this is an option that the Welsh Government should consider. What is crucial is that the depth of support available should emulate that previously provided by the Welsh Music Foundation.

Audiences do not currently have a **good central source of gig listings**. A helpful project for either a new music agency or Creative Wales would be to establish an open-source event platform that venue operators can use to upload gig information.

We welcome the Welsh Government's decision to launch a **fund for grassroots music venues**. The engagement we had with those running small venues during this inquiry was excellent. Their passion and knowledge suggest that public money invested in this sector would be well spent.

Small venues provide an invaluable social role, for both performers and audiences, as well as providing the first rung on a ladder that our artists need if they aspire to progress and play larger venues. This fund should focus on modernising venues to improve their financial stability and improving access for

people with disabilities. Rehearsal spaces are also necessary for bands to develop their skills, so should also be eligible for this funding.

We heard that small amounts of funding would be very useful for grassroots venues. This will enable them to buy pieces of sound equipment or update their facilities. We feel there should be scope for venues to apply for larger grants than the £5,000 limit the Welsh Government is trialling. A new PA system, for example, even for a small venue, would cost well in excess of £5,000. This limit should be kept under review, with an eye to increasing it once the Welsh Government and the industry are confident that the scheme is operating well. The Committee will continue to look at the operation of this fund in its future scrutiny of the Welsh Government and discussions with the music sector.

We heard convincing evidence that it is **hard to access rehearsal spaces outside of urban centres**. Many buildings – including arts centres – in these areas receive public funding, either from local authorities or agencies such as the Arts Council. Funding-providers should consider attaching conditions to this funding that, where possible, these spaces are opened up as rehearsal spaces for musicians.

The launch of **Creative Wales** provides an exciting opportunity to grow the live music industry. The advisory board that supports Creative Wales needs to include industry experts and young people so that it can effectively support the sector and consider the needs of young artists and audiences.

Music Venues Trust's idea of **protecting venues by buying them and leasing them to venue operators** is worth pursuing. This would remove the threat posed to venues when landlords decide they want to make a different use of their asset – as was the case with Cardiff's Gwdihw – leading to the venue's closure. This approach should be considered by local authorities, indeed, Cardiff Council has already acted in this manner, buying the land adjacent to Clwb Ifor Bach and leasing it to the venue, allowing for its planned redevelopment. Despite the initial capital outlay, the local authority would gain an asset and rental income stream. The Welsh Government should establish a **capital fund to facilitate the purchase of grassroots music venues** with a high cultural and social value. This could be used by local authorities or interest groups to help them purchase venues under threat. The Welsh Government should also consider alternative solutions which would have a similar effect, such as renting premises and sub-letting them to venue operators.

The model of **multi-use venues** is one that seems to both maximise their financial sustainability and social value. A music venue that also provides a place for new parents' groups to meet during the day can offer benefits to more

members of the community than a live music venue alone, and can offer a day-time as well as night-time income. We saw a great example of Tŷ Pawb in Wrexham where a space hosts live music alongside shops and offices. When the public sector supports live music venues, it should do so, where possible, with the intention of venues moving towards this model of operation.

**Recommendation 7.** The Welsh Government needs to ensure that there is enhanced support and advice available for the music industry, whether this be through Creative Wales or the establishment of a new body. This support needs to be available across Wales and at a grassroots level, where intervention is most needed.

**Recommendation 8.** The Creative Wales advisory board should include industry experts and young people so that it can effectively support the sector and consider the needs of young artists and audiences.

**Recommendation 9.** The Welsh Government should establish a capital fund to facilitate the purchase of grassroots music venues with a high cultural and social value. This could be used by local authorities or interest groups to help them purchase venues under threat. The Welsh Government should also consider alternative solutions which would have a similar effect, such as renting premises and sub-letting them to venue operators.

**Recommendation 10.** Many buildings – including arts centres – outside of urban areas receive public funding, either from local authorities or agencies such as the Arts Council. Funding-providers should consider attaching conditions to this funding so that, where possible, these spaces are opened up as rehearsal spaces for musicians.

## 4. Talent development: best practice needs to be rolled-out across Wales

Support and mentoring for young people in the live music industry should be available across Wales. Development opportunities for emerging artists should also be strengthened to provide more tailored support for the artists involved. Music must be taught in schools in a way that resonates with young people's lives, and develops the enthusiastic performers and audiences needed for a thriving industry.

The Forté Project and Young Promoters' Network: "fantastic" projects that "should be pan-Wales"

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**87.** The Forté Project<sup>84</sup> is an artist development programme that works with ten artists a year based in Merthyr Tydfil County Borough Council, Rhondda Cynon Taff, Caerphilly, the Vale of Glamorgan and Bridgend. Funders for the Project include the Welsh Government, the Arts Council of Wales and the Performing Rights Society Foundation. Support for the young artists includes industry mentorship, live performance opportunities and personal development. The Forté Project has received funding from the Arts Council of Wales and Welsh Government to explore the possibility of rolling it out across Wales.

**88.** Joedi Langley, Welsh Government head of sector development, told the Committee:

"we've funded a feasibility into the Forté BEACONS project, which is exploring the roll-out of that across Wales, but there's an anticipation in that that there will be—. Forté south Wales will continue, but there will be a new Forté north Wales as well."

**89.** The Young Promoters Network<sup>85</sup> (YPN) was formed in 2010 and is part of the SONIG Youth Music Industry programme, delivered by Rhondda Cynon Taff

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<sup>84</sup> <https://www.forteproject.co.uk/>

<sup>85</sup> <http://www.youngpromotersnetwork.com/>

County Borough Council's Cultural Services. The current network consists of young people, residing in Rhondda Cynon Taf, who are aged between 14-25, with the ambition to create live music events and in the process, promote young emerging acts. The Network is funded by the Welsh Government's Families First<sup>86</sup> programme.

**90.** The Forté Project and YPN are run by Spike Griffiths and Joss Daye. Mr Griffiths described to the Committee how they:

“see a lot of young people who possess wonderful talents, but they’ve got no access to the music industry, they’ve got no sense of what they can do in music, and they’ve got no music community to gravitate to.”<sup>87</sup>

**91.** Mr Daye described the transformative impact that music can have on young people's lives:

“I think understanding oneself and exploring your ideas of who you are as a person is something that music in particular is excellent at doing. Particularly for me, it enabled me to find out who I was, what I wanted to be.”<sup>88</sup>

**92.** He described the positive impact that working in these projects had had on his overall development:

“Through performing, I think that building up my communication skills, working in teams, working with people, working with lots and lots of different people, working with people that are perhaps older than you as well— learning how to relate to adults properly and in a working environment, I think that is integral.”<sup>89</sup>

**93.** Mr Griffiths summarised the impact that Forté had on the young people he worked with:

“It’s performance, it’s doing your best, it’s making the right decisions, it’s being confident, it’s an understanding of values. And all those things then provide a wonderful foundation, one that’s going to carry them on

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<sup>86</sup> <https://gov.wales/families-first>

<sup>87</sup> Para 96, CWLC meeting 6 November 2019

<sup>88</sup> Para 100, CWLC meeting 6 November 2019

<sup>89</sup> Para 100, CWLC meeting 6 November 2019

for the rest of their life, not just for the year of which we have them within Forté.”<sup>90</sup>

**94.** Ethan Duck, who is an artist that has taken part in the Forté Project, said:

“Having those connections for advice and everything was amazing and crucial, to be honest. I don’t know what we would’ve done without constant guidance from Spike and Joss and everyone else at Forté.”<sup>91</sup>

**95.** Witnesses the Committee spoke to only had positive things to say about the Forté Project and YPN. Bethan Elfyn described Forte as a “fantastic”<sup>92</sup> project, and John Rostron described them as “outstanding”<sup>93</sup> projects. Mr Rostron explained that:

“It’s just ignited these young people in these poor areas who have aspirations, and it’s completely open. It’s not just about artistic—it’s people who want to be a photographer or they want to put on a show, and they all muck in and do it.”<sup>94</sup>

**96.** He went on to call for its expansion across Wales:

“But it’s only in five boroughs at the moment. [...] they should be a pan-Wales—[...]That is what is needed across Wales, because when you think about the Well-being of Future Generations (Wales) Act 2015, that’s at the heart of what Spike and the guys have been doing for five years, and to roll that out across Wales so that everybody in every borough had access to that—...

Naturally, there’s become a relationship between them and Horizons, where artists at Forté, who tend to be younger, less confident, not necessarily wanting—they’re just exploring their creativity—perhaps build up some resilience and then move into something like Horizons, which is a bit more like the music industry—you’re moved about, rough and tough. So, on the artistic side, that would be my big recommendation.”<sup>95</sup>

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<sup>90</sup> Para 107, CWLC meeting 6 November 2019

<sup>91</sup> Para 139, CWLC meeting 6 November 2019

<sup>92</sup> Para 277, CWLC meeting 2 October 2019

<sup>93</sup> Para 55, CWLC meeting 6 November 2019

<sup>94</sup> Para 55, CWLC meeting 6 November 2019

<sup>95</sup> Para 56-57, CWLC meeting 6 November 2019



**97.** In November 2020, after the first phase of the Committee’s work, the Forté Project ~~expanded Wales-wide~~, using funding from the Arts Council and PRS Foundation. However, this expansion does not reflect an increase in funding for the organisation, but the increased geographic reach of providing digital support during the pandemic. Usually Forté would work with 10 artists over a year. The pilot expansion will see them working with 6 artists over 6 months.

**98.** Rhydian Dafydd from the band The Joy Formidable called for more investment in helping young people make music:

“I do worry that, unless we expose young people and get them involved—say there’s funding for them to get in and have studio time and get into the fun element of just creating music and expressing—then we’re going to miss a trick, because they just haven’t grown up being used to that and so they don’t know any different. That’s definitely a concern of mine: that, culturally, it’s almost like people become, possibly in many areas, a bit apathetic in terms of going to shows. I think we need to change people’s perceptions, and the only way you do that, I think, is by investing in it.”<sup>96</sup>

**99.** Spike Griffiths said that expanding has “always been a thing that I would really love to do”<sup>97</sup>. He described the in-depth work that would be needed to provide the support he currently provides in a number of south Wales local authorities across the nation, requiring links with local individuals and institutions, including higher education.

## Horizons

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**100.** Horizons<sup>98</sup> is a talent development programme funded by the Arts Council of Wales and BBC Cymru Wales, that works with 12 artists each year. The Arts Council explained how this programme works:

“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

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<sup>96</sup> Para 343, CWLC meeting 22 January 2020

<sup>97</sup> Para 134, CWLC meeting 6 November 2019

<sup>98</sup> [www.bbc.co.uk/programmes/articles/1W4vynGjVSWwMTtLw0CXk18/what-is-horizons-gorwelion](https://www.bbc.co.uk/programmes/articles/1W4vynGjVSWwMTtLw0CXk18/what-is-horizons-gorwelion)

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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.”<sup>99</sup>

**101.** Bethan Miller (a photographer), Siân Adler and Lewys Mann (both videographers) talked to committee staff at the Sŵn festival industry conference<sup>100</sup>. They called for more support for non-musical roles in the industry, such as those they represent, and managers. Siân Adler pointed out the positive impact this would have on retaining talent in Wales.

**102.** The Deputy Minister told the Committee:

“we have been having discussions with Skills Wales specifically to see how we can be more positive in ensuring that the arts economy and the music economy does work, and there are options that we have discussed with various businesses and that would be something that we would expect Creative Wales to focus on because I do anticipate Creative Wales working on that boundary between art as business and business creating art, if you like.”<sup>101</sup>

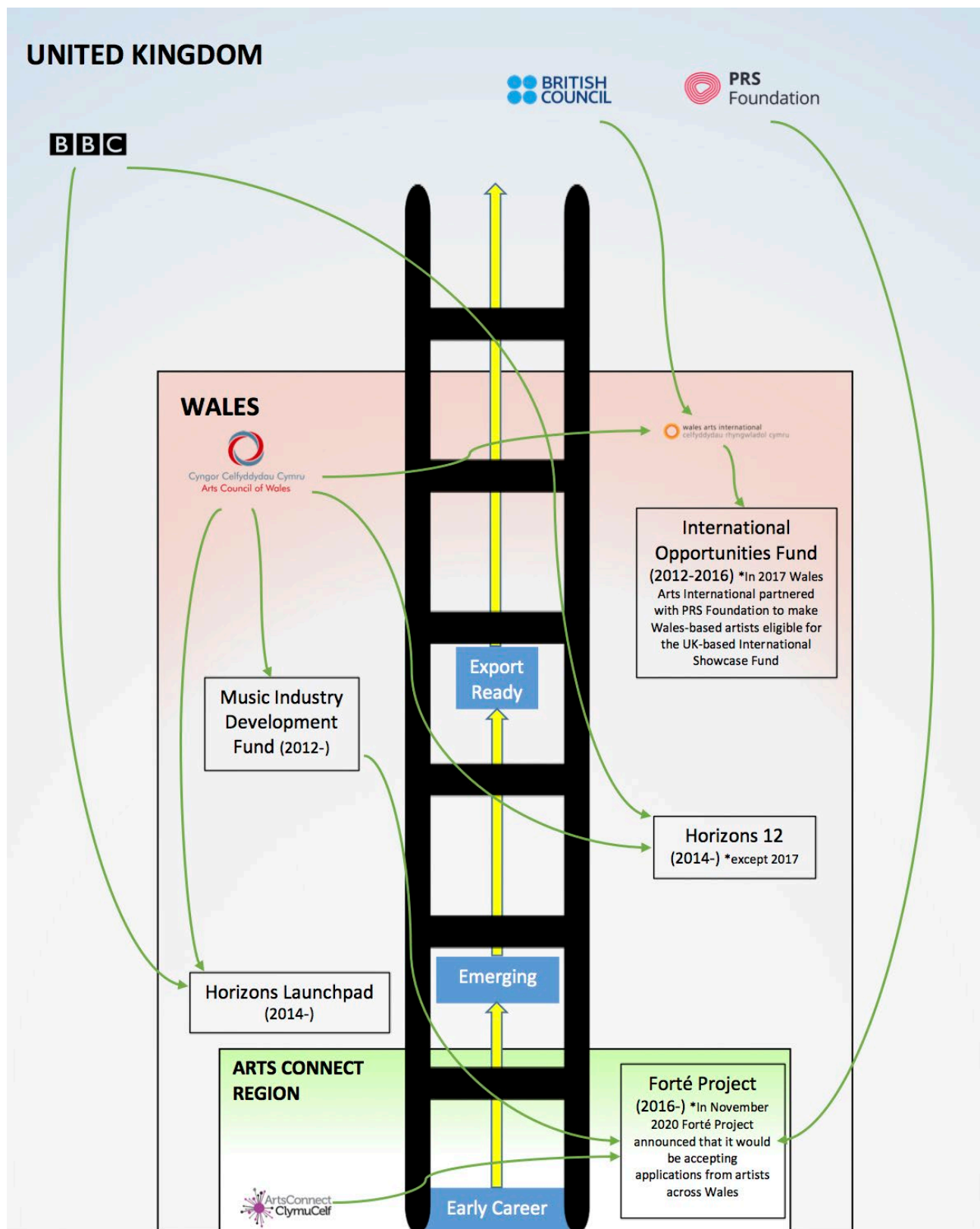
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<sup>99</sup> Arts Council of Wales written evidence

<sup>100</sup> Sŵn Festival Music Industry Conference 18 October 2019

<sup>101</sup> Para 85, CWLC meeting 13 February 2020

## Talent development support available in Wales



Source: Luke Thomas (PhD Candidate at the University of South Wales)

Music in education: best practice should be shared, and music should be taught in a way that connects with young people's lives

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**103.** Formal music education – provided through schools and local authority music services – was not a main focus of this inquiry, though their role in developing talent inevitably arose in discussion with stakeholders.

**104.** Several times during the inquiry Lewis School in Pengam was cited as a good example of the way in which statutory education can prepare young people for employment in the live music industry. BBC presenter Bethan Elfyn told the Committee:

“Lewis School, Pengam, have done field trips to Radio 1 with their music students, and they’ve got a track record of being in touch, I suppose, with the music industry and even contacted me, saying, ‘These are the artists that have come from our school who are now working in music.’ And they’re very good at getting those musicians and artists to go back and discuss it with other students.”<sup>102</sup>

**105.** Spike Griffiths, who runs the Forté Project and Young Promoters Network, told the Committee:

“There are some great examples of schools doing really good work, though—Lewis Pengam in Caerphilly. I’m there quite frequently, and I see—. [...] all the boys—line the corridors. You can’t work your way out, because everyone’s playing music in the corridors. It’s a great example of a teacher who’s motivated, has a great vision, young people who can connect with that teacher, and they have great facilities because that teacher goes out seeking funding.”<sup>103</sup>

**106.** Bethan Jenkins, who teaches music at Lewis School, gave evidence to the Committee.<sup>104</sup> She described how using modern music production software, industry engagement and continuing contributions from successful alumni had created an enthusiastic atmosphere around learning music. Consequently, about half of their pupils take music GCSE, far more than the Welsh average of 7 per cent.

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<sup>102</sup> Para 291, CWLC meeting 2 October 2019

<sup>103</sup> Para 205, CWLC meeting 6 November 2019

<sup>104</sup> CWLC meeting 16 January 2020

**107.** Green Man festival made the case that investment in music education in schools can broaden access to the music industry:

“Early investment in music in schools, develops both the musicianship and the passion for making music and is key to encouraging more young people to consider a career in music and performance. It also offers an inclusive music opportunity for all, and not just for children whose parents are willing to offer and can afford music lessons. If every Welsh child had an opportunity to learn a musical instrument what an incredible investment that would be into their lives and what a strong statement that would make to the world.

Wales has been highly successful in developing acting talent, and most successful Welsh actors will claim their early experiences in Welsh youth drama organisations has helped them achieve their goals. Artists and bands should be saying the same.”<sup>105</sup>

**108.** UK Music raised concerns in its evidence about the decrease of music GCSE entries in Wales: a 24 per cent reduction between 2013-14 and 2017-18. They say:

This has an impact on the live sector pipeline of performing and technical talent, and it is important that the reasons for such a decline are explored.<sup>106</sup>

**109.** Professor in Popular Music Analysis Paul Carr outlined his views on how music education in schools should “be culturally relevant in the delivery and its assessment”<sup>107</sup>:

“Across the UK there is an over-emphasis, in my opinion, on the classical canon. I’m not disputing its importance and not suggesting in a million years that it needs to be reduced in any way, but in my view, through looking at some of the curriculums across the UK, there could definitely be, first of all, I think more emphasis on commercial music, but the big thing for me isn’t just including popular music in the school curriculum—that’s tokenistic, in my view. We’ve got to assess it right, and at the moment, in my view, it’s being assessed through a Eurocentric, classical lens... The assessment isn’t fit for purpose in a lot

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<sup>105</sup> Green Man Festival written evidence

<sup>106</sup> UK Music written evidence

<sup>107</sup> Para 341, CWLC meeting 2 October 2019

of instances... So, yes, I think music needs to be culturally relevant in the delivery and its assessment.”<sup>108</sup>

**110.** Music is one of the five disciplines within the Expressive Arts Areas of Learning and Experience in the Welsh Government’s final version of the Curriculum for Wales 2022 published in January 2020. The accompanying guidance refers to the need to consider ‘styles, genres and creative texts across all disciplines and spanning people, places, cultures and time’ when designing the curriculum.

## Our View

**Support and mentoring for young people in the live music industry should be available across Wales.** The Committee heard excellent evidence about the success of the Forté Project and Young Promoters Network in south Wales, which work with young people who make music or are involved in promoting live events. These projects help to promote equal access to the industry – something that has been undermined by a reduction in funding for music education provided through local authorities.

The personal growth young people experience through these projects is not limited to musical and production skills. Rather, music provides an excellent vehicle through which young people can gain confidence and other transferrable skills that will help them succeed in any path they choose to follow in life.

The Committee welcomes the Forté Project making use of the freedom afforded by digital delivery during the pandemic to work Wales-wide. This geographic expansion needs to be accompanied by an increase in funding so that young people across Wales can benefit from the depth of support previously available through Forte in south Wales. . Options for delivering this include:

- Funding the team behind Forté and YPN to expand their services across Wales.
- Providing this support through a new music development agency for Wales.

However this support is provided, the current team behind Forté and YPN should be directly involved in the programme design. The Arts Council of Wales

<sup>108</sup> Para 341, CWLC meeting 2 October 2019

will review which arts organisations it provides with annual revenue funding in 2021. It should strongly consider funding a nationwide organisation to support young people in the live music industry.

The Horizons programme provides excellent opportunities for young artists. By using the BBC's network of events, as well as the contacts of those who run Horizons in Wales, emerging artists can play at events that expose them to new audiences and allow them to grow as performers. What seems to be lacking – no doubt due to a shortage of resources – is the one-on-one mentoring of the artists involved. We heard how helpful this level of support is when provided to Forté's young artists – we see no reason to think this would not also help musicians at the next stage of their careers. **The Horizons programme should be expanded** so that artists receive more career development advice and support to help them take their careers to the next level.

Various initiatives – such as Horizons and the Arts Council's International Opportunity Fund – provide opportunities for Welsh musicians to develop their careers outside of Wales. It does not seem, though, that there is any strategy guiding how this work takes place. **There should be a clear strategy, framework and brand for presenting music from Wales outside of Wales**, whether this be at UK-based (but internationally facing) events like The Great Escape and Liverpool Sound city, or abroad (such as SXSW, Folk Alliance International and M For Montreal).

One reason why emerging artists leave Wales is because of a **shortage of the non-musical professionals needed for a successful music industry**, such as managers, promoters and agents. Talent development work ought to include support for these professions. This would enable us to retain more of our talented musicians, and the value from the intellectual property they produce.

In a previous inquiry looking at local authority music services ("Hitting the right note"),<sup>109</sup> we called for the establishment of rock and pop ensembles. These are one way that young people can be encouraged to participate in music.

The success of Lewis Pengam shows **the full potential of teaching music in schools using contemporary methods and styles**. We feel that analysis of other music alongside the western classical canon will help pupils to develop a lifelong love of music. This will encourage them to create and perform

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<sup>109</sup> <https://www.assembly.wales/laid%20documents/cr-ld11595/cr-ld11595-e.pdf>



throughout their lives, as well as being the active and passionate audience members that live music needs to flourish.

**Recommendation 11.** Support and mentoring for young people in the live music industry – like that previously available through the Forté Project and Young Promoters’ Network in south Wales – should be available for the whole of Wales and should include professions such as managers, promoters and agents. The Arts Council of Wales should strongly consider funding such a nationwide organisation during its investment review.

**Recommendation 12.** The Horizons programme should be expanded so that artists receive more career development advice and support to help them take their careers to the next level.

**Recommendation 13.** Music should be taught in schools in a way that recognises the full value of contemporary music. The Welsh Government should ensure that a wide range of genres, including contemporary popular music and music from other cultures and traditions is taught under the new Curriculum for Wales.



## 5. Local authority activity: the music industry needs a louder voice in decision making

Local authorities need to do more to recognise the importance of music in their communities. Live music is under threat, and should be supported at all levels of government policy making. Music boards should be established across Wales to provide an interface between local authorities and the music industry.

**111.** Many of the policies that have an impact on live music venues – namely planning, licensing and business rates – are delivered by local government. Issues around planning and business rates in particular have been associated with venues in Wales that have either closed – such as the Point in Cardiff Bay – or been threatened with closure – such as the venues on Womanby Street in Cardiff.

**112.** In April 2019 Cardiff Council published a report into the city’s music sector produced by consultancy Sound Diplomacy.<sup>110</sup> The report makes 12 strategic recommendations which, if fully incorporated into Cardiff’s Music Strategy, could see:

- The creation of a major international signature event/festival and artist showcase;
- The establishment of a Music Board for the city to represent and champion Cardiff as the UK’s first Music City;
- Appointing a Music Officer – described as “the primary recommendation in this report”;
- A masterplan for Castle Quarter which highlights its unique position within Cardiff’s music scene;
- The renovation and refurbishment of St David’s Hall to create a revitalised national Concert Hall of Wales;

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<sup>110</sup><https://cardiff.moderngov.co.uk/documents/s29331/Cabinet%2018%20April%202019%20Music%20Ecosystem%20study%20App%201a.pdf>

- The revision of existing licencing policies and introduction of Musician Loading zones at city centre venues; and
- The creation of a Cardiff Music City tourism marketing strategy.

**113.** Cardiff Council subsequently established a Music Board in October 2019 , which will bring together industry experts to provide advice to the Council and develop a Music Strategy.<sup>111</sup>

**114.** When the Music Board was announced, Cardiff Council Leader Huw Thomas told the BBC:

“Our ambition is to transform Cardiff into the first UK city where music is incorporated into its structure - that means everything from planning and licensing to social well-being and tourism.”<sup>112</sup>

**115.** When giving evidence to the Committee, Cllr Thomas described the Board:

“I see it as a delivery vehicle, to be honest. Because, when you look at the recommendations from the music strategy, a number of them quite clearly can only be delivered holistically through joint working between the council, between other public bodies, and the industry. So, the music board really is a convening of the different people that are going to deliver that strategy, first and foremost. The elephant in the room is funding, because there are certain recommendations that we cannot deliver without funding.”<sup>113</sup>

**116.** When discussing the possibility of other local authorities following Cardiff’s lead on establishing music boards, Cllr Thomas said:

“I guess the question for them is whether they have enough sense of scale to make that exercise worthwhile individually or whether they expect it to be done collectively. I suspect some of the challenges that emerged through our report, particularly around licensing and planning, are also ones that would be affecting other local authorities. But it’s possible, and perhaps, through the Welsh Local Government

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<sup>111</sup> [www.cardiffnewsroom.co.uk/releases/c25/22650.html](http://www.cardiffnewsroom.co.uk/releases/c25/22650.html)

<sup>112</sup> [www.bbc.co.uk/news/uk-wales-50220114](http://www.bbc.co.uk/news/uk-wales-50220114)

<sup>113</sup> Para 154, CWLC meeting 16 October 2019

Association, that the learning in Cardiff can be incorporated elsewhere.”<sup>114</sup>

**117.** Attendees to the Committee’s workshop in Wrexham said that regional music boards would provide a helpful interface between the industry and local government. They felt that local authorities are currently not sufficiently aware of the special status of music venues, which are half cultural and half commercial entities. PYST’s Alun Llwyd supported the proposal to establish regional music boards, saying:

“If we can take those kinds of boards or those kinds of panels where there is sensible consultation, not only with the experts, but with the potential audience, then that is certainly something that should be encouraged on all counts.”<sup>115</sup>

**118.** Neuadd Ogwen’s Dilwyn Llwyd expressed frustration at his relationship with Gwynedd Council, and said that regional music boards were “a very good idea”<sup>116</sup>. “I feel a bit isolated at the moment”, he explained, “and I’m sure that many venues or promoters feel the same way”<sup>117</sup>.

**119.** At the Committee’s workshop in Cardiff some attendees said that they felt that local authorities prioritised day over night-time activity. Examples of this included the difficulties that bands face trying to offload equipment near venues, and the extent to which local authorities are willing to facilitate sporting events in a way it was thought they would not for music events. One venue owner noted how fighting football fans are accommodated as a natural consequence of certain sporting events. If those were rival music fans, she suggested, her venue would be closed down.

**120.** Attendees also highlighted the difficulties that poor public transport poses for accessing live music. These concerns were shared by the Forté Project, who work with young artists. Cllr Thomas recognised these problems when he spoke to the Committee:

“In Cardiff, we have a situation where there are no trains running late at night, there are no buses running late at night, or it’s a far more limited

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<sup>114</sup> Para 160, CWLC meeting 16 October 2019

<sup>115</sup> Para 127, CWLC meeting 30 January 2020

<sup>116</sup> Para 47, CWLC meeting 30 January 2020

<sup>117</sup> Para 243, CWLC meeting 30 January 2020

provision. What impact does that then have on the health of the sector?"<sup>118</sup>

**121.** Green Man noted the environmental impact of travel in the live music industry, saying that:

"Using fossil fuels for travel and in particular flights and audience vehicles is an issue and alternative and less impactful forms of travel need to be considered."<sup>119</sup>

**122.** We heard comments from young artists about threats to personal safety, particularly sexual harassment and assaults, at live music events. Artist Missy G described how a desire to get involved in making music can put women in vulnerable situations. She is now part of Ladies of Rage, a network that supports women in male-dominated musical genres.

### Our View

Local authorities need to do more to recognise the importance of music in their communities. Live music is under threat, and should be supported at all levels of government policy making. **Music boards** should be established across Wales to provide an interface between local authorities and the music industry. Local authorities should look at the example of Liverpool, which seems to have established the most successful music board in the UK.

Providing an opportunity for the industry and local authorities to regularly discuss issues that affect live music – such as planning, business rates, licensing and parking – would help policies to be developed in a way that benefits all parties involved. The closure of the Arches studio shows what happens when a local authority acts without good knowledge of the music industry that is active on its doorstep.

The population of Cardiff and its status as a capital city merits the existence of a music board just for Cardiff. But in more rural areas local authorities may like to consider one board that provides advice to a number of local authorities in the region.

Poor public transport is clearly a barrier to accessing live music, especially for people living outside of urban centres. One way to tackle this is for venues to

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<sup>118</sup> Para 133, CWLC meeting 16 October 2019

<sup>119</sup> Green Man Festival Written Evidence

work with transport providers to provide joint tickets that cover the cost of public transport alongside the event ticket (at a lower cost than buying them both separately).

Cardiff Council's establishment of a music board, and the degree of ambition it has demonstrated in this area is to be welcomed. Council Leader Huw Thomas told us that "doing what we can to protect those current venues first is where you should start, and then look to grow".<sup>120</sup> The first act of the Council and its Music Board needs to be looking at why small venues are closing in the city, and what can be done to reverse this trend.

We are concerned by reports of sexual harassment and assault taking place at live music events. Music boards would provide a good space to discuss how to tackle this issue, many incidents of which may not be reported to the police and so go otherwise undetected.

**Recommendation 14.** Music boards should be established across Wales to provide an interface between local authorities and the music industry. These should play an active role in local authorities' development of policies that impact upon the music industry, including planning, licensing, business rates, personal safety and transport.

## Planning: the planning system should actively advocate for live music

The impact of the 'agent of change' planning principle should be closely monitored to ensure that it protects live music venues from complaints resulting from new developments nearby. Local authorities' development plans should identify spaces where cultural activity can take place in new developments in the same way that they consider access to public transport and other amenities.

### Planning: the impact of the "agent of change" principle should be monitored

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**123.** The agent of change principle means that those responsible for making a change must also be responsible for managing the impact of that change. In the case of live music, this could mean the developer of a new residential building near an existing live music venue being required to include noise mitigation measures as part of the new development.

**124.** In 2017, following a petition calling for this change to happen to protect live music venues, the Welsh Government instructed local authorities to apply the

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<sup>120</sup> Para 245, CWLC meeting 16 October 2019

“agent of change” principle to planning considerations with immediate effect<sup>121</sup>. This change followed a high-profile campaign to “Save Womanby Street”, a street in Cardiff that is home to a number of live music venues, and which campaigners felt was threatened by a planning application to develop a vacant building.<sup>122</sup>

**125.** This principle is now embedded within the Welsh Government’s primary planning policy document Planning Policy Wales which states:

“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.”<sup>123</sup>

**126.** Gerwyn Evans, Creative Wales deputy director, told the Committee:

“There's a consultation on the agent for change, which is open now, so I think the key thing for us as Creative Wales is to get many of our stakeholders to feed into that consultation, to feed in their views on the agent of change, so that when that consultation comes in, we can work with others in Government to see if there is any potential for change.”<sup>124</sup>

**127.** Planning Policy Wales makes a number of references to the value of safeguarding cultural activity – such as live music – within the planning process. For example, it describes the value of “cultural and creative clusters” (of which Womanby Street in Cardiff – Clwb Ifor Bach’s location - would seem a prime example):

“Creative and cultural businesses (such as theatres, music venues and arts centres) can thrive in shared space environments and hubs and help create diverse, vibrant, and viable places that are attractive to related and unrelated businesses. Traditionally, such hubs grow from the ground up with local and national government playing an enabling role. There is evidence that these quarters often evolve from quite humble origins utilising cheap, often disused, building spaces.

In formulating development plans, planning authorities should be mindful of these creative and cultural clusters in their retail and

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<sup>121</sup> [e-Petition: Live Music Protection in Wales](#)

<sup>122</sup> [www.bbc.co.uk/news/uk-wales-south-east-wales-41435564](http://www.bbc.co.uk/news/uk-wales-south-east-wales-41435564)

<sup>123</sup> <https://gov.wales/planning-policy-wales>

<sup>124</sup> Para 115, CWLC meeting 13 February 2020

commercial centres and, if appropriate, seek to identify these areas with associated policies, to ensure that their contribution is recognised and valued.”<sup>125</sup>

**128.** The concept of “place-making” was introduced into Welsh Government planning policy in 2018 as a way of implementing the aims of the Wellbeing of Future Generations Act. Planning Policy Wales says that:

“The planning system should create sustainable places which are attractive, sociable, accessible, active, secure, welcoming, healthy and friendly. Development proposals should create the conditions to bring people together, making them want to live, work and play in areas with a sense of place and well-being, creating prosperity for all.”<sup>126</sup>

**129.** Rhiannon Bryan from The Joy Formidable made the point that cities – especially in North America – can flourish because of their connection with music:

“There are cities in the States where their entire urban economy is based on them being a music city. Take Nashville and Memphis and all these cities that are bulging with tourists and also with musicians. There’s music on constantly when you walk down so many of the streets. [...] We’ve got a really great basis for being able to create more of that.”<sup>127</sup>

**130.** Some witnesses proposed additional measures to protect live music venues. Music Venues Trust and UK Music advanced the concept of using noise easements to protect existing music venues from noise complaints from new neighbours.

**131.** Their use is not widespread and they remain untested in the long term, but noise easements have been reportedly used to allow venues, such as nightclubs, to make noise up to existing levels without the threat of complaints from residents of new developments.<sup>128</sup> One possible approach would be for noise easements to be negotiated between music venues and developers during the planning process.

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<sup>125</sup> <https://gov.wales/planning-policy-wales>

<sup>126</sup> <https://gov.wales/planning-policy-wales>

<sup>127</sup> Para 370, CWLC meeting 22 January 2020

<sup>128</sup> [www.bbc.co.uk/news/uk-england-london-25642151](http://www.bbc.co.uk/news/uk-england-london-25642151)

**132.** The Committee's discussions with witnesses drew out a tension that is implicit in the principle of cultural zoning. Though zoning is intended to protect areas in which cultural activity takes place, it may inadvertently ghettoise cultural activity in these areas, rather than allowing it to flourish across a city. Cllr Thomas highlighted this tension in his discussion of cultural zoning:

"I can see the argument for it. Areas like Womanby Street are excellent examples of how that could work, and, if you were to do that, then, certainly, that gives you a red line on the map that you could look at business rate relief around as well, for example. But, clearly, ultimately, you want to be able to spin out these types of venues into other parts of the city as well. So, I think it's a difficult balance to strike. But let's recognise where we are, the health of the industry, and the challenge that the industry's facing that, as I said, a third of UK venues have closed. I think doing what we can to protect those current venues first is where you should start, and then look to grow."<sup>129</sup>

**133.** As mentioned in Chapter 1, the closure of Gwdihw on Cardiff's Guildford Crescent was one of the issues that inspired the Committee to investigate the state of live music. Gwdihw was a small venue that closed, along with several other small businesses, after the landlord decided not to renew their leases. The street – one of the few 19th Century streets in the city centre – has now been demolished, except for the facades. When the Committee discussed this issue with Cllr Thomas, he stated that "it wasn't a planning issue that led to the closure of Gwdihw ... because there still hasn't been a planning decision on what goes on that site":

"But, clearly, there's a planning dimension. [...] the fundamental issue there was that you had a site in private ownership, and the owners decided they wanted to do something different with it. I met with them and I tried to persuade them otherwise, but they have their reasons for wanting to do that. It's difficult to criticise a private owner for wanting to do something with their own piece of land. Where I would want to get to is that the ecosystem in Cardiff is sufficiently strong that, if a venue has to move, there's an opportunity for them to relocate somewhere else.

In terms of the planning process, I think we have moved on, particularly through the adoption of the agent of change principle into the latest

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<sup>129</sup> Para 245, CWLC meeting 16 October 2019



Welsh Government planning policy. I think that's extremely helpful. But planning is something that, as councillors, we tear our hair out about regularly. It's a quasi-judicial process, strictly governed by legislation, and, if a council committee takes a decision based on its gut feeling, it'll end up in front of the Planning Inspectorate and, at considerable legal expense, they'll find against the council. So, it is challenging generally."<sup>130</sup>

**134.** Following the Committee's session with Cardiff Council, an application was submitted by the landlords of Ten Feet Tall, a small Cardiff music venue, to change the premises' use.<sup>131</sup> These plans have been approved, and the building is set to become a restaurant and shops..

### Our View

The 'agent of change' principle is to be welcomed, though its impact should be closely monitored to see if it succeeds in protecting existing live music venues from threats posed by new developments. The Welsh Government should consult with the Music Venues Trust to ensure that the agent of change principle is not being abused by developers, for example, by taking readings of noise levels at unrepresentative times of the day.

**Live music venues which are established and integrated within their communities should be protected from noise complaints resulting from new developments nearby.** Should the agent of change principle not provide enough support for venues in this regard, planning authorities should consider other measures, such as the "noise easements" approach advocated by UK Music and the Music Venues Trust.

The Committee is disappointed that the changes proposed by Ten Feet Tall's landlords to the buildings use will see the loss of another venue in Cardiff. It would be tempting to call for further planning policies that prevent the closure of live music venues, by restricting landlords from changing the use of existing venues. However, we are mindful that a delicate balance needs to be struck: policies to prevent the change of use of venues may inadvertently stop new ones from opening, as landlords are reluctant to take on businesses that restrict their freedom in this manner. We urge Cardiff's Music Board to help the Council

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<sup>130</sup> Para 238, CWLC meeting 16 October 2019

<sup>131</sup> [PP 08410529](#)

review their planning policies to ensure that they enable live music venues to flourish.

**Live music should not just be seen by planning authorities as a problem to mitigate, but an opportunity to develop urban areas.** Cities in North America such as Nashville and Memphis show how music can attract tourists and develop the local economy. Wales's vibrant bilingual music scene – unique in the UK – should be used by planners as a powerful development tool.

The social and cultural values that we heard ascribed to music – bringing people together and allowing citizens to develop their creativity- are synonymous with the concept of place-making introduced into Welsh planning policy in 2018. This is the Welsh Government's attempt to bring the sustainable development goals of the Wellbeing of Future Generations Act into the planning system, and is to be welcomed<sup>132</sup>. Local authorities' development plans should identify spaces where cultural activity can take place in new developments in the same way that they consider access to public transport and other amenities. **For citizens to flourish they need to socialise and create, and this needs to be advocated for in the planning system.**

**Recommendation 15.** The Welsh Government should work with the Music Venues Trust to review the effectiveness of the agent of change planning principle. If substantial evidence is found of existing music venues being adversely effected by new developments then it should strengthen policies to protect existing venues, including considering the use of noise easements, as recommended by UK Music and the Music Venues Trust.

**Recommendation 16.** Local authorities' development plans should identify spaces where cultural activity can take place in new developments in the same way that they consider access to public transport and other amenities.

### **The Arches rehearsal studio: a case study in the loss of a cultural asset**

The Arches was a rehearsal studio in the railway arches in the centre of Cardiff. It closed in 2019 following years of disputes between the owner, the planning authority and the developers of a new office development directly in front of the studio. The Arches was popular with young bands as it was affordable and had good public transport access.

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<sup>132</sup> Well-being of Future Generations (Wales) Act

Tom Pinder, who ran the studio, got in touch with the Committee to explain the circumstances around the closure of his business:

*When developers applied for planning permission to build immediately outside our studios, which would also have involved cutting off the road we used to access the premises and also causes inevitable conflicts of interest in terms of noise, it became clear that the council Planning Officers involved weren't really aware of our existence. When I first got in touch with him the Planning Officer attached to the case told me that he assumed that the arches were unused. Presumably this is because the shutters were quite often locked during the daytimes, and we deliberately didn't have any external signage at that time, but I obviously had the studios registered with the council for business rates, commercial waste collection and various other things.*

*I don't think they'd have had a statutory obligation to consult us about the planning application anyway, but it would have been useful to have been involved from the beginning so we could work together with the council and the developers to ensure that everyone could be kept happy.*

*As a small business it was always easier for people to ignore us, or to just not notice us, but if the council is serious about wanting to protect and promote music provision within the city they ought to be aware that small businesses like ours don't have the clout, knowledge or contacts to effectively advocate for themselves in these kind of circumstances, especially when compared to large developers. This therefore means that the council, and their planning department in particular, ought to be much more pro-actively engaging with music businesses in the vicinity of planned developments, to open a conversation between all interested parties at an early stage.*

*When we started raising awareness of the planning issues back in 2016 I found that several individual Councillors we contacted were very helpful, but the planning system itself is set up in such a way that it actively engages with the big developers who want to build, and actively ignores (in my experience) the very small businesses that happen to already be trading on that site, and making a valuable cultural contribution to the city, albeit under the radar.*

*If there was someone at the council to help us to advocate our position, or a system in place to help us to engage from an early stage, I think my studios would still be running today, alongside the new development. At the end of the day we were completely supportive of the development that was*

*happening right outside our doors, we just hoped we could be helped to continue to trade whilst the development went ahead.*

*My business has now closed, despite the fact that it was always busy and was a valuable resource for a lot of Cardiff's musicians. The railway arches that we occupied had been used by bands for at least 25 years, and it's a shame that not only will they will never be used for the same purpose again, but also it's unlikely that any similar provision will ever exist in the city centre again due to lack of suitable alternative buildings and prohibitive start-up costs.*

## Licensing: venues should have greater input

Licensing conditions placed on venues in relation to security should be reasonable and proportionate, and make it easier for them to host events for under-18s. Giving venues a greater input into the process of determining their security requirements should be trialled. More industry involvement in the licensing system is needed to eradicate racial profiling in the risk-assessment of live music events.

### Security requirements should be proportionate

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**135.** Licensing of the provision of entertainment and the sale and supply of alcohol are not devolved - they remain reserved to Westminster. Licensing is carried out by local authorities, who have a certain amount of discretion as to how to enforce relevant legislation.

**136.** Of relevance to small venues, the Live Music Act 2012<sup>133</sup> amended the Licensing Act 2003<sup>134</sup> ("the Licensing Act") so that a licence for a live music performance is no longer needed if it takes place between 8am and 11pm to an audience of no more than 500 people. UK Music told the Committee that the Licensing Act says nothing about promoting culture, but is instead focused on reducing harm.<sup>135</sup>

**137.** When the Committee spoke to venues they heard of different experiences of the licensing system from venues in different local authorities. Guto Brychan from Clwb Ifor Bach described his experience of changes in the licensing system that have made it harder for young people to attend gigs:

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<sup>133</sup> [www.legislation.gov.uk/ukpga/2012/2/contents/enacted](http://www.legislation.gov.uk/ukpga/2012/2/contents/enacted)

<sup>134</sup> [www.legislation.gov.uk/ukpga/2003/17/contents](http://www.legislation.gov.uk/ukpga/2003/17/contents)

<sup>135</sup> Para 50, CWLC meeting 16 October 2019

“One of the main problems I’ve seen—and I’ve been working in Clwb Ifor Bach for more than 25 years now—is that it’s more difficult for young people to attend live music events in places like Clwb—grass-roots music venues. Particularly people aged from 14 to 18. And that’s because of the licensing rule changes. It’s more difficult for under-18s to go to these venues. What happens to a certain extent then is that their first music experience is in big venues such as the Motorpoint and arenas, and then they think that’s the experience of going to live music events.”<sup>136</sup>

**138.** He also noted what he felt was an iniquity between how arts centres and grassroots music venues are treated in the licensing system:

“Our gigs in Clwb hold 250 people upstairs; according to the licensing rules we’d need four security staff, so that’s a cost of £250 in addition, without mentioning paying for the band and so on. If you had a gig in St David’s Hall for almost 1,000 people, or over 1,000 people, they only need a couple of security people to look after the people entering the building and to make sure that they exit safely.”<sup>137</sup>

**139.** Samantha Dabb of Le Public Space, by contrast, was very complimentary about her experience of Newport’s licensing team:

“I don’t have any issues with Newport licensing; they’re wonderful. They are really brilliant people whom, if I go to them and I want to do something, they will go out of their way to find ... a way to fit that into my licence.”<sup>138</sup>

**140.** This positive view was echoed by Gary Lulham of Swansea’s Sin City, who noted the licensing authority’s accommodation of all-ages shows.<sup>139</sup>

**141.** John Rostron proposed to the Committee a model of licensing that allowed for venues to take on more responsibility for safety at their events. He said that councils should “give the responsibility to the experts—simple as that”.<sup>140</sup> This approach could see licensing authorities taking greater note of the input from

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<sup>136</sup> Para 3, CWLC meeting 26 September 2019

<sup>137</sup> Para 68, CWLC meeting 26 September 2019

<sup>138</sup> Para 206, CWLC meeting 26 September 2019

<sup>139</sup> Para 209, CWLC meeting 26 September 2019

<sup>140</sup> Para 76, CWLC meeting 6 November 2019

venue operators on such matters as determining what level of security they would need for individual events in order to create a safe environment.

**142.** The Arts Council of Wales called for local authorities to take “a pragmatic view” of licensing, saying that “these spaces could offer much to under 18s if they could only access them”<sup>141</sup>.

**143.** Betsan Moses, CEO of the National Eisteddfod, described security requirements placed by the licensing authority on the Eisteddfod, which she felt suggested that Maes B was “seen as a festival akin to Glastonbury”. This created a situation where, at certain times, there were “more security staff [...] than there is an audience”, which created an “uncomfortable” atmosphere. She suggested that this could be down to a lack of understanding, either of the nature of the event or the licensing legislation.<sup>142</sup>

#### **Licensing and young people: a case study on the impact the licensing system can have on young artists**

When he spoke to the Committee, Spike Griffiths, who runs the Forté Project talent development programme, shared his experiences of the impact of the licensing system on the young acts he works with:

*Licensing is problematic; it has been for as long as I can remember it. I've worked in different local authorities and it varies from one place to the next, in terms of the uncertainties sometimes that a young person faces in terms of entry to a venue can change. I have a really heartbreaking story that I'll tell you quickly.*

*The fact is that we were working with a young band from Merthyr, who were cutting their teeth in Merthyr, doing really well. We were supporting them. They were ready to play Cardiff, and they went down. They found their own way to Cardiff. I was assured that one of the parents would be there. They got there, they set up behind closed doors, sound checking, of course. When the manager, I presume, came around, he got cold feet. He thought this band weren't old enough. The band—half of them had relevant ID, but they'd gone there on the pretext this was a younger audience anyway. He froze and decided that they weren't playing that night.*

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<sup>141</sup> Arts Council of Wales written evidence

<sup>142</sup> Para 130, CWLC meeting 30 January 2020

*They were there, they were sound checking, so the ultimatum, or even maybe the offer he gave to them, was that they could play, but they'd have to play behind closed doors. So, that young band from Merthyr went all the way down to play to no-one behind closed doors—no-one saw them, nothing.*

*It was their first ever time in Cardiff. They left, they had no way of getting home. They had to get on the train, they carried all their gear back home. They lived in different areas of the valley, and trains are very difficult to get back. And that was all to do with fear of licensing and how it would affect the venue there and then. And that really, ultimately, affected the band—it put them four steps back in a position which should have put them four steps forward.<sup>143</sup>*

**144.** The Music Venue Trust called for guidance on the implementation of the Licensing Act. It cited “burdensome licensing conditions” that make it harder for grassroots music venues than arts centres to host gigs for young people, and costly requirements for door staff.<sup>144</sup>

**145.** Trac’s written evidence called for public entertainment licensing to be devolved to Wales to allow “business rate discounts in exchange for demonstrably programming so many hours of live music”.<sup>145</sup>

**146.** The Deputy Minister told the Committee:

“The licensing requirements will be certainly considered as part of the activity of Creative Wales, because it's precisely placed here between the commercial activity and the community or locality interest, and the relationship to both the business and to the artistic activity. We are aware of the issue of disparity in licensing between music venues and other cultural venues, and we will certainly expect Creative Wales to address this.”<sup>146</sup>

**147.** Creative Wales deputy director Gerwyn Evans explained further:

“It's been brought up at the Cardiff Music Board, and other stakeholders have mentioned to us the disparity between different acts having different levels of licensing requirements. So, it's definitely

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<sup>143</sup> Para 232, CWLC meeting 6 November 2019

<sup>144</sup> Music Venue Trust written evidence

<sup>145</sup> Trac written evidence

<sup>146</sup> Para 136, CWLC meeting 13 February 2020



something that's on our radar to work with the Welsh Local Government Association"<sup>147</sup>

**148.** An issue raised at the Committee's workshop at the Tramshed was apparent racial profiling in designating events as "high risk". This meant that events that typically had large non-white audiences – such as grime nights – are judged to have higher security requirements, which can make such events costly to put on. This issue was raised in the House of Commons Digital, Culture, Media and Sport Committee's report into Live Music.<sup>148</sup> The Committee's Chair at the time, Damien Collins MP, said:

"It's shocking to hear that grime artists are continuing to face prejudice, which risks hampering the success of one of our most successful musical exports."<sup>149</sup>

**149.** Clwb Ifor Bach acknowledged that they were involved in discussions with the local authority about apparent racial profiling of events, but would not be drawn on details.<sup>150</sup> UK Music told the Committee that licensing officers sometimes have prejudiced views of modern genres such as grime and drill, which colours licensing decisions.<sup>151</sup> Ruth Cayford at Cardiff Council said that "through the music board, we need to look further into this, because it's obviously a serious problem that we need to resolve."<sup>152</sup> She said that the Music Board would feature a live music safety forum to "specifically look at these issues"<sup>153</sup>, and others including access to live music for young people.

**150.** The police forces provided us with details of how they assess risk posed by live music events. They described an intelligence-led approach, where many factors were considered, including previous behaviour by artists and promoters. Dyfed-Powys Police noted:

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<sup>147</sup> Para 137, CWLC meeting 13 February 2020

<sup>148</sup> <https://publications.parliament.uk/pa/cm201719/cmselect/cmcumeds/733/733.pdf>

<sup>149</sup> <https://www.parliament.uk/business/committees/committees-a-z/commons-select/digital-culture-media-and-sport-committee/news/live-music-report-published-17-19/>

<sup>150</sup> Para 83, CWLC meeting 26 September 2019

<sup>151</sup> Para 68, CWLC meeting 16 October 2019

<sup>152</sup> Para 202, CWLC meeting 16 October 2019

<sup>153</sup> Para 206, CWLC meeting 16 October 2019



“The type of event is taken into account, some types of music do attract a certain age group and may have linked behaviours, such as drugs or excess alcohol.”<sup>154</sup>

**151.** South Wales Police described the approach they had taken to a gig at Cardiff Students Union by drill artist Headie One. At this point, Headie One had an impending prosecution for a knife crime offence and a serious stabbing that occurred backstage at one of his previous events. Accordingly, additional security requirements to reduce the risk of knife crime were imposed on the event, which passed without incident.<sup>155</sup>

**152.** Cllr Huw Thomas outlined the challenges faced by local authorities in trying to place appropriate conditions on live music venues to keep people safe. He noted that the seemingly strict licensing conditions in part reflected the need to manage risk as a result of small police numbers:

“On an average Saturday night, you will have, probably, only 14 policemen policing the city centre. There’s probably more people guarding this building (*the Senedd*) than there are guarding Cardiff on a Saturday night. So, they are right to be concerned about their resourcing, and I think that is reflected, then, in the ask that they put into the licensing process.”<sup>156</sup>

**153.** Jon Day, Head of Economic Policy at Cardiff Council, said communication was one of the problems that venues faced when navigating the licensing system. He was optimistic that the new music board should help in this regard:

“The aim of bringing the music board together is that those people are together in one group, so rather than conversations taking place in various different offices elsewhere, it’s in one place, which makes it easier, I suppose, to tackle those issues.”<sup>157</sup>

**154.** Cllr Thomas wrote to the Committee explaining the roles of the police and licensing authority in determining security requirements in live events:

“Whilst local authorities in Wales act as the Licensing Authority, the Police are the key Responsible Authority in relation to the prevention of

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<sup>154</sup> Police Liaison Unit written evidence

<sup>155</sup> Police Liaison Unit written evidence

<sup>156</sup> Para 188, CWLC meeting 16 October 2019

<sup>157</sup> Para 197, CWLC meeting 16 October 2019

crime and disorder and employ Officers who act independently from local Councils in visiting venues and discussing these matters with owners and promoters. Whilst we maintain close liaison with the Police, local authorities will only have an administrative role if agreement can't be reached between a venue and the Police, in which case the matter proceeds to a Licensing Hearing where Members will hear the evidence. In practice, agreement is normally reached between the Police and venues without any involvement of local authorities.”<sup>158</sup>

**155.** In response to a question about the issue of possible racial profiling in licensing, the Deputy Minister said that the “celebration of multi-cultural and multi-racial is central” to society.

“I think the celebration of the multiracial, multicultural nature of our society in Wales is central to any approach to this issue, and there must never be any suggestion that we do not recognise the cultural and community activities of all citizens to be of equal value, and, indeed, that diversity is a public good.”<sup>159</sup>

### Our view

Licensing conditions placed on venues in relation to security should be reasonable and proportionate, and make it easier for them to host events for under-18s. The Committee heard that greater security requirements are placed on grassroots music venues than theatres and arts centres, in a way that does not reflect the level of risk posed by live music events in these venues. This approach not only imposes greater costs on grassroots music venues, but makes it harder for young people to perform at and attend gigs. One approach that was suggested to the Committee was a model of licensing that allowed for venues to have greater input into the process of determining appropriate security requirements at their events. This idea has merit, and should be trialled by licensing authorities, to the extent that it is possible within the existing legal framework. Venue operators are the experts, and their views on what security requirements are needed to create a safe environment should be given greater weight by licensing authorities.

We heard from venues in Cardiff that their licensing conditions are unnecessarily onerous. However the local authority has to ensure safety in a busy

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<sup>158</sup> Cardiff Council written evidence

<sup>159</sup> Para 144, CWLC meeting 13 February 2020

city centre, which has previously had problems with alcohol-related violence. We are optimistic that the new Music Board for Cardiff should help the council take a more intelligence-led approach to licensing, and reduce the conditions placed on grassroots music venues where possible.

A number of people told us about **apparent racial profiling in designating events as “high risk”**. This means that events that typically had large non-white audiences – such as grime nights – are judged to have higher security requirements, which can make such events costly to put on. This is not acceptable, and we call for closer relationships between licensing authorities, the police and the music industry, so that such prejudiced views can be challenged and eliminated.

We are concerned by the claim from Dyfed-Powys Police that “some types of music” are linked to certain behaviours, and would question what evidence base this claim is made on. We are concerned that an approach led by typecasting certain genres may have a greater impact detrimentally on BAME communities than it does on preventing crime.

Police and Crime Commissioners should investigate the licensing conditions attached to live music events to assess to what extent these are racially motivated. Musical diversity, including genres such as grime and drill, is a vital part of a vibrant and creative culture, and needs to be supported by local authorities and the police.

**Recommendation 17.** Licensing authorities should:

- work with small venues to agree proportionate licensing conditions, to the extent that is possible within the existing legal framework;
- work with venues to make it easier for them to hold all-ages shows;
- work with trusted venues to give them greater input into determining appropriate security requirements, to the extent that is possible within the existing legal framework. Venue operators are the experts, and their views on what security requirements are needed to create a safe environment should be given greater weight by licensing authorities.

**Recommendation 18.** Licensing authorities and the police should work with the industry – through music boards if these are established – to improve their knowledge of the music industry so as to avoid the risk of racial profiling in licensing decisions.

**Recommendation 19.** Police and Crime Commissioners should investigate the licensing conditions attached to live music events to assess to what extent, if any, these are influenced by unconscious racial bias. If any bias is found, the police should put steps in place to prevent it.

## Business Rates: grassroots venues in Wales should not be worse off than those in England

Business rates relief should be available to grassroots music venues in recognition of their social and cultural value. If the Welsh Government receives consequential funding following the UK Government's decision to cut business rates for live music venues in England, this should be spent on financing equivalent rates relief for venues in Wales.

Grassroot music venues should be subject to business rates relief in recognition of their cultural and social value

**156.** The analysis in this chapter is based on arrangements before the pandemic. Currently, businesses in the hospitality, retail and leisure sectors with a rateable value below £500,000 (which covers all but fewer than 200 businesses) receive a 100% rates exemption. The analysis in this chapter has been retained on the grounds that the pandemic-related rates relief schemes are intended to be temporary, and it is currently unknown what schemes will operate beyond the pandemic.

**157.** Business rates (sometimes known as non-domestic rates or NDR) have been fully devolved to Wales since April 2015 and are calculated in the following way:

$$\begin{array}{ccccccc}
 \text{£} & = & \left( \text{£} \text{ } \text{Rateable value of non-domestic property} \times \text{\% Multiplier } 0.535 \text{ in 2020-21} \right) & = & \text{£} \text{ } \text{Annual Business rates liability} & - & \text{Any reliefs the property is eligible for} \\
 \text{Annual Business rates bill} & & & & & & 
 \end{array}$$

**158.** In Wales, business rates are collected by local authorities and paid into a national 'pool' administered by the Welsh Government. They are then redistributed to Welsh local authorities and Police and Crime Commissioners as part of the annual Local Government Settlement and Police Settlement.

**159.** A business rates revaluation normally takes place every five years. The rateable value of properties in Wales decreased between the 2010 valuation and

the 2017 draft valuation. There was a 2.9 per cent decrease in rateable values on the local rating list (the vast majority of properties), with this decrease offset by a 25.8 per cent increase in rateable value of the properties on the central list such as major utilities and telecoms firms.

**160.** The Welsh Government and local authorities provide various forms of business rates relief, though none of these refer explicitly to music venues.

**161.** Some organisations are exempt from paying business rates. These include:

- agricultural land and buildings;
- buildings used for training or the welfare of disabled persons;
- buildings registered for public religious worship and church halls.

**162. Small Business Rates Relief**, means that small businesses can be exempted from paying business rates, or a receive a reduced bill depending on the rateable value of the property.

**163. Transitional Relief** means that small businesses that faced a reduction in Small Business Rates Relief following the 2017 re-evaluation will have their increased bill phased in over a number of years.

**164. Charitable rate relief.** If your property is occupied by a registered charity or community amateur sports club, and used for charitable purposes, you automatically qualify for 80 per cent mandatory rates relief.

**165. High Street and Retail Rates Relief** provides a discount of up to £2,500 per premise per year for a wide variety of high street businesses. The list of eligible business types in the guidance does not explicitly include music venues – though this list is not exhaustive, and music venues are also not included in the list of ineligible business types.<sup>160</sup> In its evidence, UK Music calls for grassroots music venues to be added to the list of eligible business types.<sup>161</sup> Live music venues in Wales can be eligible for business rates relief under the High Street and Retail scheme, indeed a number of venues receive it. The Welsh Government does not currently know how many venues receive this rates relief, though officials hope to have data on this by the end of the 2019-2020 financial year. During the

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<sup>160</sup> <https://businesswales.gov.wales/sites/business-wales/files/High%20Street%20and%20Retail%20Rates%20Relief%20in%20Wales%202019%20-%202020.pdf>

<sup>161</sup> UK Music written evidence

pandemic this scheme was effectively converted to the retail, leisure and hospitality relief outlined in the first paragraph of this chapter.

**166.** During the inquiry, the UK Government announced that music venues in England would be eligible for a 50 per cent reduction to their business rates bill.<sup>162</sup> Despite this being a devolved matter, a number of articles in the press referred to this change applying to venues in England and Wales, and the HM Treasury press release referred to the UK, and made no mention of these changes only applying in England. A number of venues in Wales publicly commented on how they welcomed this proposed change, seemingly unaware that it only applied to venues in England.

**167.** If the UK Government's planned rate reduction for music venues results in new funding for English local authorities, the Welsh Government would expect to receive an equivalent amount of funding to spend according to its own priorities. This planned rate reduction for music venues in England was superseded by the 100% rates relief for retail, leisure and hospitality introduced during the pandemic.

#### The impact of Business Rates on grassroots venues

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**168.** The Arts Council told the Committee that "one of the things we'd advocate is around the business rates and music venues being seen in the same way that other cultural venues are seen"<sup>163</sup>. However, when asked about the impact of the 2017 re-evaluation of rateable values on venues they described the available evidence as "hearsay rather than actual evidence"<sup>164</sup>.

**169.** UK Music's evidence stated that "as a result of the 2017 re-evaluation of rateable values business rates have increased for many Grassroots Music Venues across Wales"<sup>165</sup>. Mark Davyd from Music Venues Trust told the Committee that following this re-evaluation grassroots music venues across the UK experienced a 38 per cent increase in their business rates.<sup>166</sup>

**170.** A number of witnesses called for a reduction in business rates for live music venues. In a blog post John Rostron calls for the Welsh Government to "establish a

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<sup>162</sup> [www.gov.uk/government/news/happy-hour-for-pubs-as-government-cuts-business-rates](https://www.gov.uk/government/news/happy-hour-for-pubs-as-government-cuts-business-rates)

<sup>163</sup> Para 76, CWLC meeting 2 October 2019

<sup>164</sup> Para 83, CWLC meeting 2 October 2019

<sup>165</sup> UK Music written evidence

<sup>166</sup> Para 231, CWLC meeting 2 October 2019

reduction in business rates, or introduce business rates relief for music venues”<sup>167</sup>. Music Venue Trust calls for “a sector specific framework for use by the Valuation Office Agency”<sup>168</sup>. In oral evidence, they called for, as a “short term answer”:

“...some sort of temporary relief using existing powers that are available to local government that could be expressed by the national body. So, Welsh Government could say, ‘In our opinion, this is a crisis’—which it is in grass-roots music venues—‘we should look at either discretionary rate relief, hardship relief or even localism relief as a particular intervention.’”<sup>169</sup>

**171.** Sam Dabb, manager of Newport’s Le Public Space, wrote an article for Wales Arts Review in which she called for the Welsh Government to introduce an equivalent business rates relief scheme for small venues to the one the UK Government has announced for England.<sup>170</sup> She explained the economic difficulties faced by those running small venues, how enhanced rates relief would help, and how this would help the whole live music sector grow:

“It’s not a business you get into to get rich, and if that is the reason then you quickly get out again. Music venues are closing all over the country and one of the primary reasons is financial. Sometimes because we can’t afford to do maintenance on our buildings, sometimes because we can’t afford the legal fees to fight noise complaints, and sometimes, quite simply because we can’t afford to pay the bills. If implemented in Wales the suggested rate relief will have a huge and lasting impact on Welsh music. Every artist playing an arena today started out in a small room with a dirty floor and run down toilets.”<sup>171</sup>

**172.** Neal Thompson from FOCUS made a similar point, telling the Committee that music venues ought to have specific rate relief in recognition of their cultural significance and crucial role in the music industry:

“I think they’re still being treated very much like rateable high-street businesses, and they’re not; you know, they’re culturally significant

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<sup>167</sup> [https://medium.com/@john\\_rostron/what-can-be-done-to-support-music-venues-in-wales-acfa38eccc](https://medium.com/@john_rostron/what-can-be-done-to-support-music-venues-in-wales-acfa38eccc)

<sup>168</sup> Music Venue Trust written evidence

<sup>169</sup> Para 234, CWLC meeting 2 October 2019

<sup>170</sup> [www.walesartsreview.org/news-grassroots-music-venues-and-rate-relief/](http://www.walesartsreview.org/news-grassroots-music-venues-and-rate-relief/)

<sup>171</sup> [www.walesartsreview.org/news-grassroots-music-venues-and-rate-relief/](http://www.walesartsreview.org/news-grassroots-music-venues-and-rate-relief/)



places. As you've quite rightly pointed out, they're the seeding ground for a whole music economy."<sup>172</sup>

**173.** Daniel Minty, who runs Minty's Gig Guide to Cardiff, suggested that business rates relief should be linked to venues demonstrating their commitment to local music: for example, by programming a certain number of live music events a year.<sup>173</sup>

## Our View

**Permanent business rates relief should be available to grassroots music venues in recognition of their social and cultural value.** As a start, grassroots music venues should be added to the list of businesses that are eligible for High Street and Retail Rates Relief. Local authorities should use information gathered from their new music boards to provide targeted, temporary relief where a venue's existence is under threat and its loss would be to the detriment of the community.

Music venues in Wales should not be subject to higher business rate bills than those in England. We have seen no evidence that the challenges faced by music venues in Wales are not the same – if not greater – than those in England. If English venues continue to receive rates relief following the pandemic, the Welsh Government must pursue with the Treasury whether it should receive a Barnett consequential funding allocation. If it does, it should use this to fund an equivalent scheme in Wales.

The Welsh Government has said that music venues are eligible for its High Street and Retail Rates Relief scheme, yet it does not know how many venues receive it. The Welsh Government needs to collect accurate data on how many music venues were receiving this rates relief so that it can assess whether this policy was effectively helping the live music sector.

It was disappointing that the UK Treasury and the press failed to identify that the UK Government's business rates relief for music venues only applied in England. This led to confusion, and no doubt disappointment, among music venue operators in Wales. This situation highlights the need for a specialist music advice service to advise the sector in Wales.

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<sup>172</sup> Para 67, CWLC meeting 30 January 2020

<sup>173</sup> <https://www.facebook.com/mintysgigguide/videos/262521271356098/>



When they re-open at full capacities, it is likely that music venues will have gone at least a year without trading as venues. They are likely to have depleted financial reserves, and to face additional costs in making operational spaces and equipment that has been mothballed since March 2020. Live music venues must therefore continue to receive business rates reductions when they are able to return to full activity.

**Recommendation 20.** Live music venues should continue to receive business rates relief to help their recovery from the pandemic. Any long term successor to the High Street and Retail Rates Relief scheme should be clear that live music venues are eligible businesses.

**Recommendation 21.** The Welsh Government should regularly collect data – and share this with the Committee – on how many venues receive rates relief so that it can assess whether this policy is effective in helping the live music sector.

**Recommendation 22.** Any additional funding received by the Welsh Government following a UK Government's decision to reduce business rates for music venues in England should be used to provide equivalent rates relief for venues in Wales. Venues in Wales should not face higher business rates bills than those in England.

## 6. The coronavirus pandemic

The continued blanket ban on live music events, with no timeline for reopening, is no longer appropriate. The rationale behind the 10pm curfew is unclear and it may be counter-productive. Support from the Welsh Government has been timely and focused, but more support is needed – from both the Welsh and UK governments – to get the industry through to the end of the pandemic.

### Live music remains prohibited

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**174.** On 20 March live music venues, along with other cultural venues were ordered to close across the UK. The lockdown rules were initially implemented UK-wide but, as health is devolved, the constituent nations have since changed these restrictions in different ways.

**175.** Indoor performances were possible in England between mid-August and the recent lockdown, but in Wales live music venues have remained closed since March through The Health Protection (Coronavirus Restrictions) (No.4) (Wales) Regulations 2020, as amended.

**176.** Other venues, such as pubs, are prohibited from hosting live music. Venues are not permitted to hold live performances, including drama, comedy or music, to take place in front of a live audience. The restriction on live performances includes DJ acts. Outdoor, organised public events with more than 30 people are also not permitted.

**177.** The Committee's plans to publish a version of this report in March were cancelled following the introduction of the first lockdown. The Committee conducted emergency work in response to the pandemic over the spring and summer, before returning to the issue of live music with two focussed days of evidence gathering in November. The Research Service at the Senedd also commissioned Professor Paul Carr at the University of South Wales to produce a comparative study of support for live music during the pandemic in Wales and other countries. He presented his findings to the Committee on 19 November 2020, and his completed report can be read [here](#).

## Support for the sector has prevented widespread closures for now

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**178.** The response to the pandemic has seen levels of government intervention to protect jobs, businesses and organisations that are unprecedented in many of our lifetimes. This has included Welsh Government support for cultural organisations, such as live music venues, and workers – mainly, but not entirely, provided from additional funding provided by the UK Government.

**179.** On 1 April 2020, the Welsh Government announced £18 million to support culture, the creative industries and sport. This is a combination of Welsh Government funding, and money from other sources, such as the National Lottery. It did not involve new Welsh Government funding, but the repurposing of money already allocated in the budget to these sectors.

**180.** Creative Wales, the Welsh Government's new creative industries division, launched a £1 million fund to respond to the coronavirus emergency. This included a £400,000 Grassroots Music Relief Fund to support people – other than musicians – working in the music industry, with funding of up to £25,000 per business.,

**181.** The Arts Council distributed a £7 million Arts Resilience Fund (£5.1 million of which was from the National Lottery). The Arts Council intended to distribute £1.5 million to individuals, and £5.5 million to organisations.

**182.** On 30 July the Welsh Government announced a £53 million **Cultural Recovery Fund**. This followed the Welsh Government receiving £59 million in consequential funding flowing from a UK Government package of support for culture in England. The Welsh funding is being distributed by the Arts Council, the Welsh Government and local authorities.

**183.** Between 7 August and 9 September the Arts Council of Wales opened its portion of the fund (£27.5m) for applications. This comprised £25.5m of revenue and £2m of capital funding, all for arts organisations. The Arts Council of Wales is managing funds for:

- theatres, arts centres and concert halls;
- galleries;
- organisations producing and touring arts activity; and
- organisations providing participatory arts activity.

**184.** The **Welsh Government** is managing the remainder of the fund (£25.5m). This includes £18.5 million for the following businesses:

- music venues;
- recording and rehearsal studios;
- Heritage organisations and historic attractions;
- accredited museums and archive services;
- libraries;
- events and their technical support suppliers;
- independent cinemas; and
- the publishing sector.

**185.** Organisations were able to apply between 14 September and 2 October.

**186.** A further £7 million fund is available to support freelancers, which is being distributed by local authorities. Phase one of this funding went live on 5 October 2020. It was distributed on a first-come, first-served basis, and in some areas (e.g. Cardiff) it was fully-subscribed within an hour. The second phase went live on 19 October.

**187.** On 11 November the Welsh Government **announced** an additional £10.7 million of funding for the Cultural Recovery Fund. The Welsh Government said:

“This additional funding will be targeted towards the large number of applications, which have already been received by the Welsh Government – supporting organisations in the cultural, creative, events and heritage sectors.”

£3.5 million of this additional funding will finance another round of the freelancer funding, which should support a further 1,400 people.

### **The sector needs a clear roadmap for restarting activity**

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**188.** Since March, live music with an audience has been prohibited in Wales, in contrast to England and many other European nations. The Welsh Government guidance **Culture and heritage destinations and venues: guidance for a phased return** gives no indication of possible dates, or circumstances, in which live music will be able to restart.

**189.** A panel of venue operators called for the Welsh Government to allow socially-distanced live events to take place. Panellists agreed that live activity with

a reduced capacity would not be profitable for venues, but had other benefits to venues, performers and audiences.<sup>174</sup>

**190.** As Neuadd Ogwen's Dilwyn Llwyd told the Committee "the idea of socially distanced gigs isn't about making money; it's bound to make a loss". He explained:

"Our venue holds 400 people, so before the Government changed the rules a few weeks ago, we believed that we could get 32 people in safely. Now, that's a very small number, but it would be a start, and we could then build on that."<sup>175</sup>

**191.** Sam Dabb from Le Public Space said:

"It's not about whether we can survive financially without the gigs; it's about whether people's mental health can survive without creative outlets for the artists, and being able to access creative arts for the customers, because it's a huge, huge thing."<sup>176</sup>

**192.** Clwb Ifor Bach's Guto Brychan warned that there was a risk to rebuilding the sector if Wales continued to lag behind other UK nations in restarting activity:

"I think artists themselves have been suffering greatly over this period, so it's an opportunity to provide some money for the artists. But another factor that's worth considering is that, at the moment, the sector in Britain, particularly the grass roots, is starting to arrange tours again. A lot of the bands that would play in Clwb or Le Pub are now touring on a socially distanced basis in England, and we can't offer them dates in Wales. So, there is a risk that if this discrepancy remains in place for too long, then we are going to lose touch with the broader sector, and it's going to make it much more difficult for us to rebuild the strong sector that we had for new music in Wales once we have an opportunity to stage events in future."<sup>177</sup>

**193.** Sin City's Gary Lulham reiterated the wider benefits to the sector of restarting activity:

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<sup>174</sup> Senedd CWLC 5 November 2020

<sup>175</sup> Para 169, Senedd CWLC 5 November 2020

<sup>176</sup> REFERENCE

<sup>177</sup> REFERENCE

“Putting on socially distanced gigs, whilst not necessarily financially beneficial, would allow me to get people back into work. Some of those people who would work on those events are freelancers, who currently aren't on my PAYE system, so haven't had the support, and haven't had the furlough scheme, so it would allow me to get them back into work, and they can start earning again.”<sup>178</sup>

**194.** Guto Brychan also noted that grassroots venues were better placed than larger venues to restart activity, but were not being consulted on this matter by the Welsh Government:

“There is an events taskforce having regular discussions with Government, but they represent the major festivals and the major venues such as Motorpoint. There is nobody, at the moment, from the grass-roots sector on that taskforce giving our perspective, and to a certain extent we are the industry that's going to be able to reopen with live events quickest, because the window for us to start to make arrangements for putting a gig on is a fair bit shorter than Motorpoint or the major festivals, who need six to 12 months to put a programme in place.”<sup>179</sup>

**195.** The Musicians' Union has called on the government to introduce a “seat matching scheme”, “which would take venues' potential revenue to 60%” as a way of re-starting activity whilst social distancing measures remain in place.<sup>180</sup>

**196.** Professor Carr's report calls for “Welsh Government to develop a detailed and clear short-term reopening strategy for the Welsh music industries”. He also calls for the Welsh Government to fund digital activity, stating that the Welsh Government should:

“As part of a digital strategy [...] explore an online ‘culture at home’ initiative (including both live and recorded work), which not only showcases Welsh music alongside other art and culture, but also encourages and finances digital capacity and creativity.”<sup>181</sup>

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<sup>178</sup> Para 175, Senedd CWLC 5 November 2020

<sup>179</sup> Para 222, Senedd CWLC 5 November 2020

<sup>180</sup> <https://musiciansunion.org.uk/Home/News/2020/Sep/Coronavirus-Presses-Mute-Button-on-Music-Industry>

<sup>181</sup> <http://livemusicexchange.org/wp-content/uploads/Paul-Carr-Culture-Welsh-Language-and-CC-Report.pdf>

**197.** He notes that:

“Nations such as Argentina, Belgium and Chile have financed ‘culture at home’ initiatives, which finances artists to produce content and provides a regularly updated digital portal for the general public to access.”<sup>182</sup>

**198.** The Musicians’ Union’s Andy Warnock compared the situation in hospitality – which has been able to reopen, with various mitigations in place – to the situation with live performances, which have faced a blanket ban:

“I’d like to see more conversations about what things could be put in place as mitigations, while allowing some reopening [...]. I think that the cinemas/theatres things is maybe a thing that a lot of us are thinking about, also hospitality—could a theatre open its cafe or restaurant space and have performances with people seated? There have been venues that, before, were looking at having people seated, just with a DJ. At the moment that’s still not permitted.”<sup>183</sup>

**199.** Neal Thompson from FOCUS Wales pointed out that large events, such as his festival, have a long organisational lead-in time. This means they need clear guidance on the likelihood of them being possible under coronavirus restrictions some time in advance of the planned date.

The rationale behind the 10pm curfew is unclear and it may be counter-productive

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**200.** Since 24 September all licensed premises must stop serving alcohol at 10pm, and be closed by 10.20pm. This decision by the Welsh Government followed a similar announcement by the UK Government in respect of England. The curfew remained in place in the new hospitality rules following the firebreak lockdown in October.

**201.** Due to current restrictions on live music, live music venues – where they are open – are essentially pubs. Cardiff’s Clwb Ifor Bach, for example, had **reopened in August** as a bar open until 2am. Following the Welsh Government’s announcement of the 10pm curfew it closed again, **saying**:

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<sup>182</sup> <http://livemusicexchange.org/wp-content/uploads/Paul-Carr-Culture-Welsh-Language-and-CC-Report.pdf>

<sup>183</sup> Para 89, Senedd CWLC 19 November 2020

“Although we are confident that the measures we have in place provide a safe and welcoming environment, the additional staffing costs associated with running a venue in line with the current guidelines coupled with the new restrictions on opening hours mean that it is no longer financially viable for us to remain open.”

**202.** Newport’s Le Pub has also **criticised** the decision, saying that the “curfew will lead to the closure of thousands of viable thriving businesses”. It also suggests that alcohol-fuelled socialising will not stop at 10pm, but will simply move to unregulated premises.

**203.** Venue owners expanded on the impact of the curfew when they gave evidence to the Committee on 5 November. Clwb Ifor Bach’s Guto Brychan explained how the curfew made opening his venue as a pub unprofitable:

“We did manage to reopen for four or five weekends at the end of August and beginning of September when it was possible to reopen as a pub, but unfortunately, once the 10 o’clock curfew came in, it was financially unsustainable for us to remain open because 70 per cent of our income came in after 10, so we decided to close again.”<sup>184</sup>

**204.** Le Public Space’s Sam Dabb explained how she felt the curfew was counter-productive:

“People are going to be drinking until 1 or 2 o’clock in the morning—that’s the nature of human beings, it’s going to happen. If they’re doing it in venues that are tracking and tracing and insisting they sanitise and insisting they distance, then I think they’re much safer. We’re not going to stop people partying, but the more control we have over the environment they do it in, the safer we can keep them.”<sup>185</sup>

**205.** Spike Griffiths, who runs the Forté Project, explained how he felt the curfew was ineffective and disproportionately impacted live music venues:

“Reducing late-night behaviours was obviously probably at the core of the decision, but it’s not really going to stop the transmission right now. It’s probably driven people more into their homes for late-night drinks, and that’s where the transmission’s probably at its most rife.

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<sup>184</sup> Para 145, Senedd CWLC 5 November 2020

<sup>185</sup> Para 183, Senedd CWLC 5 November 2020



So, the other thing, really, is also about the venues themselves. They don't start going until 8 p.m. or 9 p.m., and that's allowing just one hour for entertainment or for people to enjoy themselves. If you think about someone working an average day, finishing at 5.55 p.m., they're going to have one or two hours going out, so it's not really viable. It might work for pubs, of course, with the 11 o'clock curfew, but venues don't come alive until beyond 10 p.m.”<sup>186</sup>

**206.** Since the Committee held its autumn evidence sessions, the Welsh Government has introduced additional restrictions on the hospitality industry prior to Christmas. From 4 December pubs, bars, restaurants and cafes must close by 6pm and they will not be allowed to serve alcohol. After 6pm they will only be able to provide takeaway services. This will affect any live music venues that have been able to operate as pubs during the ongoing restrictions, but given the reduction in profitability imposed by the 10pm curfew, this number is likely to be small.

**207.** The Welsh Government has made a further £340m package of support available through the Economic Resilience Fund. This includes a £180m fund targeted at hospitality and tourism businesses.

The live music sector needs support beyond March 2021, and many people have missed out on support entirely

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**208.** The Welsh Government's Culture Recovery Fund is intended to cover the period up until March 2021. The furloughing scheme has also been extended so far only up until 31 March 2021. It is clear that, at this point, the live music sector will still be operating under significant restrictions that prevent it from being financially self-sufficient. We are optimistic that vaccine rollout will be well underway by this point, but it is unlikely to have achieved sufficient coverage for the sector to re-open without social-distancing measures.

**209.** The Musicians' Union's Andy Warnock welcomed the extension of the furloughing scheme until March 2021, but noted that the UK Government employment support schemes still contained large gaps that prevented people in the live music sector from receiving support:

“Furlough's been extended until March, and that's great, but there are still really significant gaps [...] and Welsh Government can't fix those. I

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<sup>186</sup> Para 82-83, Senedd CWLC 19 November 2020

hope it's still lobbying for them to be fixed. That is going to have a really ongoing effect still.

The self-employment support scheme is not now anywhere near as generous even as it was from January, I think. And we've got so many members—I think it's about a third—who are missing from that entirely. And so, there are some members in Wales who have only had their £2,500 freelance fund grant, and even as we look towards reopening, because of all the problems that we've discussed, that is still for us a really significant problem and a key focus.”<sup>187</sup>

**210.** This Committee noted the gaps in employment support in its previous reports into the impact of the pandemic on the arts and creative industries. UK Music has estimated that 72% of people in the UK music sector are self-employed.

<sup>188</sup>

**211.** Andy Warnock from the Musicians' Union told the Committee that 38% of his members could not access the Self-Employment Income Support Scheme. He explained:

"Lots of the criteria cause problems, to do with if you've recently become self-employed, you're excluded; if your profits are over a certain amount, you're excluded, instead of having a cap on what you can receive, like the furlough scheme. I think you have to do 50 per cent or more of your work as self-employed to qualify for the scheme. Well, if you have a portfolio career, that percentage might often vary year to year. There are some people who are on the wrong side of that. [...]

If you've taken maternity leave, taken a career break to look after children, you're probably not going to qualify; the list goes on and on. I think one of the problems is that it's based on a quite old-fashioned, simplistic view of work, I would say, where you're either self-employed or you're employed.”<sup>189</sup>

**212.** Witnesses praised the work of Creative Wales, which was launched only months before the pandemic started. John Rostron's comments were indicative

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<sup>187</sup> Para 135, Senedd CWLC 19 November 2020

<sup>188</sup> UK Music, [UK Music demands more help for self-employed hit by coronavirus crisis](#), 20 March 2020

<sup>189</sup> Para 148 -149, CWLC meeting 19 November 2020

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of those the Committee heard, applauding the prompt and collaborative nature of Creative Wales's support for live music:

"Hats off to them. They were out of the door, they were a new team, they came out fast. [...] we were really aware of how quick they were to go and try and support those venues at a point that was the best in the UK. Wales was top of the list."<sup>190</sup>

**213.** Professor Carr told the Committee that Creative Wales was helping to break down barriers between live music and the public sector:

"A lot of people really appreciate the work that is going on in Creative Wales in making some of these relationships—breaking down these relationships between local authorities and the music industry, and, of course, Welsh Government itself and the music industry."<sup>191</sup>

The pandemic has provided an opportunity to maintain and develop connections between live music and the state

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**214.** A common theme among witnesses was that life post-pandemic should not revert to life pre-pandemic. John Rostron endorsed this concept, and the Welsh Government and Arts Council's development of a "cultural contract":

"I think that's marvellous. Instead of us talking about a return back to normal, we're talking about, 'Where can we go to this new normal?' And I love the attachment of a cultural contract and the ambition of what a future Wales might look like."<sup>192</sup>

**215.** The Welsh Government has said that recipients of the Cultural Recovery Fund will be encouraged to sign a cultural contract, and that:

The cultural contract will build on the Welsh Government's existing economic contract of fair work and pay and sustainability and address areas such including:

- Board diversity
- Retained staff to support wider initiatives

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<sup>190</sup> Para 101, Senedd CWLC 19 November 2020

<sup>191</sup> Para 202, CWLC meeting 19 November 2020

<sup>192</sup> Para 116, Senedd CWLC 19 November 2020

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- Social prescribing
- Health and arts initiatives
- Environmental sustainability

**216.** Sam Dabb from Le Public Space said that “thinking outside the box and adding income streams”, during the pandemic, “has been really good”:

“I think Welsh Government should maybe look at working with venues to see what income streams they could add in case another pandemic arises or if we don't get out of this pandemic as quickly as we'd like, because those income streams that are secondary, such as food or rehearsals or something like that, could be vital and the difference between a venue surviving or not surviving.”<sup>193</sup>

**217.** Throughout the crisis stakeholders have observed that the most vulnerable arts organisations are those most dependant on commercial income, a reversal of their normal situation. Professor Carr’s report calls for the “Welsh Government to consider the viability of changing from a ‘mixed economy’ grant funding model, to one which relies less on commercial income.”<sup>194</sup>

**218.** He also calls for the Welsh Government to collaboratively “develop a long term three-year music industries’ recovery strategy”.<sup>195</sup>

### Our view

Nine months into the pandemic, **the industry needs some indication from the Welsh Government as to when they can restart activity, and a blanket ban on live events is no longer appropriate.** The Committee is sympathetic to the challenge the Welsh Government has in controlling the virus whilst enabling as much of normal life as possible to continue. But it is increasingly hard to justify why, for example, pubs and cinemas can open, but live music performances, subject to the same social-distancing measures as these other venues, cannot take place.

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<sup>193</sup> Para 266, Senedd CWLC 5 November 2020

<sup>194</sup> <http://livemusicexchange.org/wp-content/uploads/Paul-Carr-Culture-Welsh-Language-and-CC-Report.pdf>

<sup>195</sup> <http://livemusicexchange.org/wp-content/uploads/Paul-Carr-Culture-Welsh-Language-and-CC-Report.pdf>

We heard that the benefits of restarting activity are not purely economic, though any activity would benefit freelancers who have been out of work since March 2020. Grassroots venues cannot return to profitability with social distancing in place. But venue owners told us they wanted to put on performances for the cultural and mental health benefits that this would bring to venue operators, performers and audiences alike.

Restarting some activity is also needed for the long-term sustainability of the sector. The longer activity is permitted in other countries, but not Wales, the more artists get used to booking tours that preclude Wales. And the longer the sector goes without working, the harder it will be to get back to full-speed once the pandemic is over.

**Digital events are no solution to the lack of live activity, but they can provide some support for artists and audiences** who have been without live music since March 2020. The Welsh Government should explore whether the industry needs support both to create more digital activity, and to provide a central hub of Welsh digital cultural content.

**Organisers of large events need clarity** soon if they are to take place in 2021. With further details expected soon on vaccine development, the Welsh Government should soon be in position to provide this clarity. A degree of uncertainty is present in every aspect of the pandemic, which could put organisers off, if they are unable to secure insurance to cover unexpected cancellations. The Welsh Government should work with the insurance industry and the UK Government to ensure that suitable insurance is available.

**The public health benefits of the 10pm curfew are unclear.** The argument that we heard from venues, that it displaces socialising from regulated spaces (venues) to unregulated spaces (people's homes), rather than reducing socialising, is compelling, and merits further analysis from the Welsh Government. What is clear is that it undermines the profitability of the few live music venues that have been able to re-open, and disproportionately impacts on younger people. Since we took evidence the Welsh Government has introduced a 6pm curfew and alcohol ban. When the Welsh Government relaxes the current hospitality restrictions, it should either not re-introduce the 10pm curfew, or provide evidence for its effectiveness at reducing virus transmission.

**The discovery of safe and effective vaccines changes the trajectory of support for the live music sector, and makes the case for continued support more compelling.** Without a vaccine, governments could reasonably have questioned

how long they could have supported a sector which was unable to operate safely at a scale to be financially viable. With a vaccine, the case for maintaining funding for venues and individuals is one of making sure that support provided to the sector so far is not wasted.

**The Welsh Government needs to, at the earliest opportunity, set out what funding will be available for the live music sector after March 2021.** We appreciate that this funding is contingent upon the funding made available by the UK Government. The UK Government needs to make clear what funding will be available to the devolved nations in recognition of the continued lack of profitability of cultural activity.

**The UK Government needs to either extend its current forms of employment support beyond March 2021, or provide clarity about successor schemes.** There is still a sizeable cohort of freelancers who have not received any employment support, or have only received the Welsh Government's freelancer funding. The UK Government urgently needs to provide support for this sector. The Welsh Government's freelancer funding is very welcome, but is a sticking plaster on a problem that needs the UK Government's financial firepower to be resolved.

The pandemic has led to unprecedented connections between the state and the live music industry. It has also highlighted the vulnerability of cultural activity that is dependant solely on commercial success for its existence. The Welsh Government, through Creative Wales, had already begun strengthening connections with the sector before the pandemic. This needs to continue as we look towards recovery: the Welsh Government helping the sector to grow, in return for the sector – through the cultural contract – delivering Welsh Government priorities.

**The Welsh Government and the industry need to collectively design a music strategy (using expertise from the Arts Council and higher education) looking to rebuild and grow the sector, building on the strengthened connections between the two borne from the pandemic.** This strategy should consider how sub-sectors that are open for business can maximise income, and how the Welsh Government can support the strategically important parts of the industries that are closed for public health reasons to recover and flourish.

**Recommendation 23.** The Welsh Government should provide a clear roadmap for restarting live activity. It should look imaginatively at options such as socially-distanced and outdoor gigs, which, although perhaps not economically beneficial, would provide much-needed cultural activity. This plan should include other cultural events, such as theatre and dance, as well as live music.

**Recommendation 24.** The Welsh Government should explore whether the industry needs support both to create more digital activity, and to provide a central hub of Welsh digital cultural content.

**Recommendation 25.** The Welsh Government should work with the insurance industry and the UK Government to ensure that suitable insurance is available to enable large event organisers to manage the risks of arranging events in 2021.

**Recommendation 26.** When the Welsh Government relaxes the current hospitality restrictions, it should either not re-introduce the 10pm curfew, or provide evidence for its effectiveness at reducing virus transmission.

**Recommendation 27.** Where live music venues have lost income as a result of the Welsh Government's current hospitality restrictions, they should be eligible for the funding the Welsh Government has introduced to accompany these restrictions.

**Recommendation 28.** The Welsh Government needs to, at the earliest opportunity, set out what funding will be available for the live music sector after March 2021.

**Recommendation 29.** The UK Government needs to make available further funding to the devolved administrations to support the culture sector beyond March 2021, in recognition of the continued lack of cultural activity.

**Recommendation 30.** The UK Government needs to either extend its current forms of employment support beyond March 2021, or provide clarity about successor schemes.

**Recommendation 31.** The UK Government urgently needs to provide support for freelancers who have fallen through the cracks of the Self-employment Income Support Scheme.

## Next steps

**219.** The Committee will write to all of the organisations mentioned in the report recommendations, making them aware of our views. Their responses will be published on the Committee's page of the Senedd website. We will recommend that the Committee covering this remit in the next Senedd should continue to pursue the issues we have identified in this report in future meetings with the Welsh Government and other stakeholders, as well as looking at recorded music.

For more information on the timing of these events please contact  
[seneddcwlc@assembly.wales](mailto:seneddcwlc@assembly.wales).



## Annex A: List of oral evidence sessions.

The following witnesses provided oral evidence to the committee on the dates noted below. Transcripts of all oral evidence sessions can be viewed on the Committee's website:

<https://record.assembly.wales/Search/?type=2&meetingtype=445>

Date	Name and Organisation
<b>26 September 2019</b>	<b>Guto Brychan,</b> Clwb Ifor Bach <b>Terry Chinn,</b> Clwb y Bont <b>Samantha Dabb,</b> Le Public Space <b>Gary Lulham,</b> Sin City Club
<b>2 October 2019</b>	<b>Antwn Owen-Hicks,</b> Arts Council of Wales <b>Carys Wynne-Morgan,</b> Arts Council of Wales <b>Mark Davyd,</b> Music Venues Trust <b>Paul Carr,</b> University of South Wales <b>Bethan Elfyn,</b> BBC
<b>16 October 2019</b>	<b>Tom Kiehl,</b> UK Music <b>Dr Sam Murray,</b> UK Music <b>Huw Thomas,</b> Welsh Local Government Association <b>Ruth Cayford,</b> Cardiff City Council <b>John Day,</b> Cardiff City Council <b>Andy Warnock,</b> Musicians' Union
<b>6 November 2019</b>	<b>Spike Griffiths,</b> Forté Project <b>Joss Daye,</b> Young Promoters' Network

	<p><b>Ethan Duck,</b> Sponsored by Young Promoters' Network and Forté Project</p> <p><b>Callum Lewis,</b> Sponsored by Young Promoters' Network and Forté Project</p> <p><b>John Rostron,</b> Consultant</p>
<b><u>16 January 2020</u></b>	<p><b>Dayfdd Roberts,</b> SAIN (Recordiau) Cyf.</p> <p><b>Gwennan Gibbard,</b> SAIN (Recordiau) Cyf.</p> <p><b>Danny Kilbride,</b> Music Traditions Wales (Trac)</p> <p><b>Bethan Jenkins,</b> Lewis School Pengam</p>
<b><u>22 January 2020</u></b>	<p><b>Rhydian Dafydd,</b> The Joy Formidable</p> <p><b>Rhiannon Bryan,</b> The Joy Formidable</p> <p><b>Andrew Hunt,</b> Buffalo Summer</p> <p><b>Rhys Carter,</b> Valhalla Awaits</p> <p><b>Samuel Kirby,</b> Valhalla Awaits</p>
<b><u>30 January 2020</u></b>	<p><b>Betsan Moses,</b> National Eisteddfod of Wales</p> <p><b>Sioned Edwards,</b> National Eisteddfod of Wales</p> <p><b>Alun Llwyd,</b> PYST</p> <p><b>Neal Thompson,</b> FOCUS Wales</p> <p><b>Branwen Williams,</b> Blodau Papur and Siddi</p> <p><b>Osian Williams,</b> Candelas</p> <p><b>Marged Gwenllian,</b> Y Cledrau</p> <p><b>Dilwyn Llwyd,</b> Neuadd Ogwen</p>
<b><u>13 February 2020</u></b>	<p><b>Lord Dafydd Elis-Thomas AM, Deputy Minister for Culture, Sport &amp; Tourism,</b> Welsh Government</p> <p><b>Gerwyn Evans,</b> Creative Wales</p>

<b>5 November 2020</b>	<b>Guto Brychan</b> Clwb Ifor Bach <b>Gary Lulham</b> Sin City <b>Samantha Dabb</b> Le Public Space <b>Dilwyn Llwyd</b> Neuadd Ogwen
<b>19 November 2020</b>	<b>John Rostron</b> <b>Neal Thompson</b> Focus Wales <b>Andy Warnock</b> Musicians' Union <b>Spike Griffiths</b> Forte Project <b>Paul Carr</b> University of South Wales

## Annex B: List of written evidence

The following people and organisations provided written evidence to the Committee. All Consultation responses and additional written information can be viewed on the Committee's website.

Reference	Organisation
<b>M01</b>	The Society for the Traditional Instruments of Wales
<b>M02</b>	Pembrokeshire Intimate Gigs (P.I. Gigs)
<b>M03</b>	Response from an individual (unnamed)
<b>M04</b>	Sain (Recordiau) Cyf
<b>M05</b>	PYST
<b>M06</b>	Music Traditions Wales (Trac)
<b>M07</b>	Pontio Arts
<b>M08</b>	Clwb Ifor Bach
<b>M09</b>	Response from an individual (Neil Scourfield)

<b><u>M10</u></b>	Response from an individual (unnamed)
<b><u>M11</u></b>	Arts Council of Wales
<b><u>M12</u></b>	Music Venues Trust
<b><u>M13</u></b>	UK Music
<b><u>M14</u></b>	Musicians' Union
<b><u>M15</u></b>	Royal Welsh College of Music & Drama
<b><u>M16</u></b>	Response from an individual (Tom Pinder)
<b><u>M17</u></b>	Green Man Festival
<b><u>M18</u></b>	Mentrau Iaith Cymru
<b><u>M19</u></b>	Police Liaison Unit, Welsh Government
<b><u>M20</u></b>	Cardiff Council

## Annex C: Stakeholder events

The Committee held a stakeholder event on the ‘live music sector as part of a wider inquiry into the music industry in Wales’ at Tramshed, Cardiff on 4 July 2019 with the following in the attendance:

Name	Organisation
<b>Guto Brychan</b>	Clwb Ifor Bach
<b>Adam Williams</b>	Clwb Ifor Bach
<b>Steffan Dafydd</b>	Clwb Ifor Bach
<b>Dafydd Roberts</b>	SAIN (RECORDIAU) CYF
<b>Bethan Elfyn</b>	BBC
<b>Samantha Dabb</b>	Le Pub
<b>Simon Parton</b>	Musician
<b>Harish Jariwala</b>	EMW TV
<b>Sarah Jones</b>	FOCUS Wales
<b>Neal Thompson</b>	FOCUS Wales
<b>Steve Laffy</b>	Musician
<b>Ruth Cayford</b>	Cardiff Council
<b>Jonathan Day</b>	Cardiff Council
<b>Sam Murray</b>	UK Music
<b>Liz Hunt</b>	The Moon
<b>Rob Toogood</b>	Fuel Rock Club
<b>Angie Evans</b>	Fuel Rock Club
<b>Danny KilBride</b>	Folk Development for Wales
<b>Gary Lulham</b>	Sin City Club
<b>Nathan Jones</b>	Motel Nights UK
<b>Antwn Owen-Hicks</b>	Arts Council of Wales
<b>Terry Chinn</b>	Clwb y Bont
<b>Will Owen</b>	Cardiff University Students' Union
<b>Jase Hawker</b>	Pavilion Mid Wales
<b>Helen Edwards</b>	Pavilion Mid Wales
<b>Spike Griffiths</b>	Forté Project
<b>Connor Cupples</b>	Orchard_Live
<b>Adam Warnock</b>	Musicians' Union MU

The Committee held a stakeholder event on the ‘live music sector as part of a wider inquiry into the music industry in Wales’ at Town Hall, Wrexham, 28 November 2019 with the following in the attendance:

<b>Name</b>	<b>Organisation</b>
<b>Nici Beech</b>	Focus Wales
<b>Tom Bevan</b>	Theatr Clwyd
<b>Dave Grey</b>	This Project
<b>Dilwyn Llwyd</b>	Neuadd Ogwen
<b>Rhys Mwyn</b>	Musician and BBC Radio Cymru
<b>Ywain Myfyr</b>	Musician, Tŷ Siamas and Sesiwn Fawr Dolgellau
<b>Dafydd Roberts</b>	SAIN (RECORDIAU) CYF
<b>Morgan Thomas</b>	Tŷ Pawb
<b>Neal Thompson</b>	FOCUS Wales
<b>Andrew Walton</b>	Musician
<b>Gwenan Gibbard</b>	Musician and Sain

## Annex D: Arts Council funding broken down by artform

What did Arts Council of Wales Welsh Government-funded grants support in 2018-19?

	Value of grants		No of grants
Grants to support:			
Theatres & arts centres	£7,003,344	23.93%	16
Theatre production & presentation	£6,657,230	22.74%	8
Opera	£4,857,237	16.60%	3
Visual & applied arts	£1,772,984	6.06%	10
Dance	£1,722,231	5.88%	7
Music	£1,433,125	4.90%	7
Arts & young people	£1,152,741	3.94%	4
Community arts	£1,089,221	3.72%	9
Literature	£742,264	2.54%	1
Circus & carnivals	£194,608	0.66%	1
Disability arts	£165,417	0.57%	1
<b><i>Creative Learning through the Arts</i></b>	£1,644,031	5.62%	383
Other grants:			
Strategic awards	£814,291	2.85%	43
	<hr/> £29,248,724		<hr/> 493

Source: Arts Council for Wales, **Annual reports and accounts 2018-19**. NB. These figures are for the ACW's grant-in-aid funding from the Welsh Government. 92% of these grants are revenue-funding for members of Wales Arts Portfolio.

What did Arts Council for Wales-distributed lottery revenue funding support in 2018-19?

Program Area	18/19 (£000s)
<b>Combined Arts/Multi-disciplinary arts</b>	567
<b>Craft</b>	232
<b>Dance</b>	842



<b>Drama</b>	1,506
<b>Film Production</b>	119
<b>Literature</b>	348
<b>Music</b>	1,436
<b>Music/Opera</b>	368
<b>Public Art</b>	104
<b>Theatre Entertainment</b>	578
<b>Visual Arts</b>	920
<b>Cinema &amp; Video Screenings</b>	79
<b>Literature</b>	29
<b>Public Art</b>	4
<b>Cinema &amp; Video Screenings</b>	3
<b>Total</b>	7,137

Source: information provided to the Research Service by the Arts Council for Wales

NB. These figures exclude capital funding and expenditure on Creative Learning Through the Arts.

“Music” (excluding “music/opera”) represents 20 per cent of the total Lottery funding distributed by the Arts Council for Wales in 2018-19.