

# THE WELSH MUSIC INDUSTRIES IN A POST-COVID WORLD

**A Report for the Culture, Welsh Language  
and Communications Committee**

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## **Table of Contents**

<i>Executive Summary</i>	<i>1</i>
<i>Introduction</i>	<i>11</i>
<i>Chapter 1: UK Based Public and Private Body Support for the Music Industries</i>	<i>18</i>
<i>Chapter 2: Roadmaps Out of Lockdown</i>	<i>34</i>
<i>Chapter 3: Current Research on the Impact of Covid-19 on the Music Industries</i>	<i>45</i>
<i>Chapter 4: What Wales Can Learn and How Does it Compare to Other Nations?</i>	<i>80</i>
<i>Conclusion</i>	<i>99</i>
<i>Bibliography</i>	<i>109</i>
<i>Appendix 1: List of Venues in Wales Represented by the Music Venue Trust</i>	<i>122</i>
<i>Appendix 2: List of Music Industry Sectors as Outlined by UK Music</i>	<i>124</i>

## **Executive Summary**

In July 2020, Professor Paul Carr was commissioned by Senedd Research to document a report examining the ‘state of play’ in the post Covid-19 music industries in Wales.<sup>1</sup> This resultant document outlines the contextual backstory of the emergence of private and public support for the music industries in Wales since the pandemic commenced; examines the advice given to the music industries by the UK and Welsh Governments concerning roadmaps out of the pandemic; reviews the industry and academic research that has emerged since the pandemic started and finally, compares Welsh Government support packages to nations in other parts of the world. Although the report considers the Welsh music industries more broadly, its primary focus is on live music, as it is this which has been the recent concern of the Culture, Welsh Language and Communications Committee. It is also this sub-sector that has been widely reported as being impacted the most by the pandemic. The report concludes by documenting a series of recommendations for the Culture, Welsh Language and Communications Committee to consider presenting to Welsh Government.

In order to give the reader a concise snapshot of details contained in the report, this Executive Summary outlines the context of the Welsh industries pre and post Covid-19, prior to contextualising its recommendations, which are sub divided into the following six categories: Reopening and Recovery Strategies; Research; Strategic Opportunities and Promotion; Policy; Education; Funding.

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<sup>1</sup> In order to highlight the complex nature of musical activity in Wales, the term ‘music industries’ as opposed to the common term ‘music industry’ is used throughout this report when possible. See Williamson, J., & Cloonan, M. (2007). ‘Rethinking the Music Industry’. *Popular Music*, 26(2), 305-322.

## **Brief Context of The Music Industries Prior to the Pandemic**

- The economic, social and cultural value of music is widely accepted around the world.
- Welsh Government acknowledges that music plays an important part in creating a ‘national brand’, bringing meaning and enjoyment to our lives and promoting Wales and its culture to the world.
- The music industries in Wales consist of both part-time and full-time stakeholders and although dominated by live and recording sectors, also consist of other sub-sectors.
- The Music Industries in Wales are conducted in English and Welsh Languages.
- The majority of stakeholders in the music industries in Wales are freelancers, undertaking portfolio careers.
- In 2019, the worth of the UK music industries were considered to be circa £5.2 billion, generating 190,935 jobs, with ‘music creators’ representing nearly 50% of the UK music industries Gross Value Added.
- In 2019, the UK live music industries were noted as having a GVA of £1.1 billion.
- In 2019, the UK music industries were noted as having a total export revenue of £2.7 billion, with a £4.5 billion spend attributed to ‘live music tourism’.
- In 2019, Welsh music tourism was noted as attracting 363,000 people with a total spend in the region of £124 million, generating 1,754 jobs.
- There are some well noted initiatives that currently assist the development of the Welsh music industries, such as Forté, Horizons 2020 and Community Music Wales.
- The £5.2 billion quoted above must not undermine the financial struggles experienced by the majority of music creators in Wales prior to the pandemic, with the average wage for Cardiff based ‘artists and creative agents’ estimated to be around £18,000 per year.

- The Musicians' Union reported in 2018 that 44% of orchestral musicians in the UK don't have enough to live on.
- In 2012, the Musicians' Union estimated that 94% of musicians are freelancers, which have been hit particularly hard during the pandemic.
- There has been an ongoing threat to the sustainability of Grassroot music venues in Wales before the pandemic, with Cardiff venues such as Barfly, Dempsey's and more recently Gwdihw all closing.
- Although there are some exceptions, there is a noted general lack of communication in Wales between local councils and the music industries.

### **Brief Context of The Music Industries Post Pandemic**

- The music industries in Wales have witnessed the cancellation of activities such as tours, music festivals, rehearsal room and recording studio work, music tuition (both formal and informal), grassroot music performances and concert performances.
- In addition to economic factors within the Welsh music industries, the closure of the live music sector will also have a knock-on effect, with the aforementioned £124 million spend attributed to Welsh music tourism significantly impacted.
- In addition to UK Government support schemes and Welsh Government's non-domestic rates relief, funding relevant to the music industries in Wales has thus far included the £7 million 'Arts Resilience Fund' (led by Arts Council Wales and targeted toward both individuals and organisations), the £401,551.39 allocated to 22 grassroot music businesses across Wales (as part of a £1 million 'Creative Wales Fund') and the £53 million Cultural Recovery Fund.
- Although relatively generous, the £1.57 million UK Cultural Recovery fund was slow to emerge when compared to other European nations, with the Welsh allocation still not given to music venues.

- It has been widely reported that many freelancers in the music industry and the Creative Industries more broadly have been ineligible for pan-UK Government support schemes, with 88% of musicians believing the UK government have not done enough to support them according to the Musicians' Union.
- There have also been numerous private sector funding initiatives allocated, by organisations such as The Musicians' Union, The Performing Rights Society, Help Musicians UK and The Association of Independent Musicians, all of whom have attempted to meet the shortfalls in government schemes.
- Many freelancers in the UK music industries have doubted their capacity to stay in their professions post pandemic, with a recent poll by the Musicians' Union suggesting that 47% of musicians have been forced to look for work outside the music industry; 70% are unable to undertake more than a quarter of their usual work; 36% of musicians do not have any work at all.
- In May, the UK Live Music Group expected as much as £900 million to be wiped from the £1.1 billion the UK live music sector was expected to contribute to the domestic economy, with 82% of grassroots music venues noting a threat of closure.
- In July, a Department for Digital, Culture, Media and Sport (DCMS) select committee report estimated that 93% of grassroots music venues across the UK faced permanent closure, with 86% of venues reporting that their core threat stems from an inability to meet commercial rent demand.
- Without additional funding, many Grassroot Music Venues will not be able to implement social distancing requirements.
- Public facing statistical research on the Welsh music industries more broadly is none existent, with limited data on music venues types, total income, income retention and contribution to the economy.

- In addition to its economic impact, the pandemic has also halted musical careers in Wales, often at important ‘tipping points’.
- It is widely accepted that live music is the sector most impacted by the pandemic, in terms of the music industries more broadly.

## **Context to Recommendations**

### *Reopening and Recovery Strategies*

- The return to indoor and outdoor live concert performances has been very cautious in Wales, when compared to England and mainland Europe more broadly.
- Current Welsh Government advice on how the music industries can return to ‘normal’ is confusing for some, currently split between three documents.<sup>2</sup> None of the documents offer clear advice on how freelancers will be able to reengage with their profession.
- Welsh Government accepts that returning to normal will be ‘challenging’ and cannot be about returning to the same management of audiences and facilities that existed prior to lockdown. Welsh Government also acknowledges that venues will have to make significant physical and operational changes, with this responsibility being placed with the employers.
- Welsh Government acknowledges that the music industries will be one of the last sectors to return to normal activity and is in need of a long-term strategy to assist its survival.
- In addition to Scotland and England, many European nations have put policies in place to facilitate the return of live music (See table in Chapter 2).

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<sup>2</sup> *Creative Industries: guidance for a phased return*, (first published on June 19<sup>th</sup>), *Culture and Heritage Destinations and Venues: Guidance for a Phased Return* (first published on July 13<sup>th</sup>) and *Rehearsing, Performing and Taking Part in the Performing Arts: Guidance for a Phased Return* (first published September 15<sup>th</sup>).

- Nations such as New Zealand (\$16.6 million) and Australia (\$20 million) have set up specific ‘recovery fund’ packages for live music, aimed at assisting venues get back on their feet.
- The general public, venues and creatives need assistance with building confidence.
- There is real concern that if the live music industry remains closed, it will lose the talent that has sustained it.
- Music industry sub-sectors such as live music and freelancers more generally would benefit from clear guidance to assist the development of monetized alternative business models, including ‘virtual activity’.
- Aside from the Grassroot music business fund, there is no public data available regarding how Welsh Government or Arts Council of Wales ‘pandemic funding’ has impacted the music industries.

**Recommendation 1:** For Welsh Government to develop a detailed and clear short-term reopening strategy for the Welsh music industries, which outlines what is possible now; what is not possible yet; what will never be possible and what support will be available for all of these outcomes. This strategy should closely consider how sub-sectors that are open for business can maximise income, in addition to considering closely how it can support the strategically important parts of the industries that are closed for public health reasons get back on their feet.

**Recommendation 2:** In conjunction with relevant expertise from the music industries, the university sector and the Arts Council of Wales, for Welsh Government to develop a long-term three-year music industries’ recovery strategy, which takes the ongoing impact of Covid-19 into account. This plan should have a range of outcomes and consider via an action plan factors such as, how it can sustain, retain and incubate talent; how public confidence can be re-established; how the various parts of the music industries can be supported and



invigorated; how realistic alternative business models can be implemented; how industry training can meet the needs of the ‘new sector’; and how the technical infrastructures of venues/rehearsal rooms/recording studios can become ‘covid-proof’.

#### *Research, Strategic Opportunities and Promotion*

- Detailed statistical data on the Welsh music industries is non-existent.
- Since the demise of the Welsh Music Foundation ‘music industry directory’, there is no central point through which music industry stakeholders (ranging from local musicians to international promoters) can identify strategic opportunities in Wales.
- Information concerning Welsh Government’s grassroots music venue mapping (2019) has still not emerged, well over a year since its commission.
- A venue map and music industry database would assist the Welsh music industries as follows: strategic clarity on how Welsh music industry stakeholders can work together; data to highlight transport network issues; data to assist Welsh Government prioritise financial support; a portal through which potential national/international partnerships can be formed; a means through which Welsh talent can be identified, developed and showcased.
- A more nuanced understanding of what the Welsh Music Industries are would assist Welsh Government allocate funding more equitably.
- Nations such as Romania, France, Norway, Denmark and Switzerland are now facilitating more national music to be played via their media outlets.
- 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.

**Recommendation 3:** For Welsh Government to commission detailed research into the role music plays in the Welsh economy and the impact of covid-19 on its sub-sectors. In addition

to outlining the financial, societal and cultural contribution of the music industries various sub-sectors, the research should identify gaps in the ‘talent pipeline’ that exist as a result of sub-sectors closing. The overarching objective of this work should be to verify how much income the Welsh music industries generate; how much currently remains within Wales; and what can be done to ensure the nation (i.e music industry stakeholders) can retain more of it.

**Recommendation 4:** For Welsh Government to build on the venue mapping research that has already taken place, by financing a searchable public facing database of the Welsh music industries and an interactive map of its music venues,<sup>3</sup> which outlines venue types throughout the country and how these resonate locally, nationally, globally and ecologically. This map and database should be regularly updated.

**Recommendation 5:** For Creative Wales to develop and agree upon a comprehensive Taxonomy of the music industries in Wales, to ensure all relevant sub-sectors are supported and represented.

**Recommendation 6:** For Creative Wales to review its membership to ensure it reflects relevant expertise related to the aforementioned taxonomy.

**Recommendation 7:** For Creative Wales to consider the viability of not only promoting Welsh talent, but also, following European nations such as France, Norway, Denmark and Switzerland, to set the necessary protocols in place for Welsh music to be prioritised on radio and T.V, working with UK Government when necessary.

**Recommendation 8:** As part of a digital strategy, for Welsh Government to 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

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<sup>3</sup> Via a digital portals similar to Wales Screen service (see <https://businesswales.gov.wales/walescreen/>) and the Birmingham Live Music Map (see <https://livemusicresearch.online/blmp/>).

digital capacity and creativity. This digital strategy should ensure that all households in Wales have access to fast reliable broadband.

### *Policy*

- The primary reasons for grassroots venues going out of business over the last 15 years include expensive business rates, issues related to ‘noise disturbances’ and inflexible licencing.
- In addition to legislation, an important factor contributing to why some music venues in Europe have been able to open their doors earlier than in Wales, is that they have a tradition of relying less on commercial income.
- At a time when income from live music is significantly restricted, there is a need to reduce the ‘value gap’ between the major streaming platforms and that of music creators, so the latter generate more royalties for their creativity.

**Recommendation 9:** To ensure the general public continue to have access to a broad range of live music, for Welsh Government to work with local councils in order to action ongoing business rate relief and flexible licencing (for pop up events and busking for example), in addition to ensuring the ‘agent of change’ principle is implemented.

**Recommendation 10:** For Welsh Government to consider the viability of changing from a ‘mixed economy’ grant funding model,<sup>4</sup> to one which relies less on commercial income.

**Recommendation 11:** For Welsh Government to work with UK Government departments such as DCMS to reduce the ‘value gap’ for Welsh artists (the gap between a music creator’s income and the commission of ‘tech giants’).

### *Education*

- Practitioners in the post covid music industries will require a distinct skill set to their predecessors.

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<sup>4</sup> Where organisations are expected to generate large percentages of commercial income.

- Across the music industries of the world, the pandemic has brought with it not only financial challenges, but also potential associated mental health issues, as jobs and lifelong passions have seemingly disappeared and social gatherings (small and large) have been restricted at best—resulting in isolation, loneliness and despondency.
- Many music industry bodies such as the Musicians’ Union, UK Music, the Music Managers Forum and the British Phonographic Industry (BPI) have considered it important to offer advice on mental health.
- Music making and listening has proven positive impacts on mental health.

**Recommendation 12:** For Welsh Government to ensure that the various skills required in the ‘new music industries’, are reflected in school, college, university and private industry curriculums.

**Recommendation 13:** For Welsh Government to begin to consider and plan for the potential of a mental health crisis in the music industries, as the creative job market continues to be decimated as a result of the pandemic.

### *Funding*

- Many freelancers in the music industry have been ineligible for UK Government support schemes
- Previous evidence given to the Culture Welsh Language and Communications Committee indicated a lack of awareness of available funding in some sub-sectors of the Welsh music industries.
- Arts Council of Wales funding is not available to the majority of grassroots music venues.

**Recommendation 14:** For Welsh Government to work with Arts Council Wales to ensure funding is available equitably across the music industries, and that the grant application process is demystified, reaching deep into the various networks of the music industries.

## Introduction

With Welsh music activities currently still ‘on hold’, eight months after the original lockdown and the impacts of the pandemic reported by the Creative Industries Federation in June 2020 as a potential cultural catastrophe,<sup>5</sup> the prospect of the Welsh music industries returning to ‘normal’ is still, in late October, very uncertain. Although now difficult to imagine, but as recently as November 2019, the UK music industries were noted in the Guardian as hitting a ‘record high’, with its value to the UK economy considered to be circa £5.2 billion.<sup>6</sup> This statistic came from UK Music,<sup>7</sup> who estimated in their 2019 ‘Music By Numbers’ report that the UK music industries had generated 190,935 jobs, with ‘music creators’ representing nearly 50% of the UK music industries Gross Value Added (GVA).<sup>8</sup> The music industries are also noted in the report as having a total export revenue of £2.7 billion, with a £4.5 billion spend attributed to ‘live music tourism’ and live music making a GVA contribution of £1.1 billion, which includes grassroots all the way through to large music festivals. Although the report does not analyse specific territories of the UK in detail, it does note that Welsh music tourism attracted 363,000 people (who are not local to the events they are attending), with the total spend considered to be in the region of £124 million, generating 1,754 jobs.<sup>9</sup>

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<sup>5</sup> Creative Industries Federation (2020), ‘Our World Without Culture’, Available at: <https://www.creativeindustriesfederation.com/news/press-release-cultural-catastrophe-over-400000-creative-jobs-could-be-lost-projected-economic> [Last Accessed September 21, 2020].

<sup>6</sup> Mark Sweeny. ‘Value of UKs Music Scene Hits Record High’, The Guardian, November 20 2019. Available at <https://www.theguardian.com/business/2019/nov/20/value-of-uk-live-music-sector-hits-11bn> [Last Accessed September 21, 2020].

<sup>7</sup> UK Music are a campaigning and lobbying group, which represent the live and recorded music sectors.

<sup>8</sup> UK Music. ‘Music By Numbers’ (2019). Available at [https://www.ukmusic.org/assets/general/Music\\_By\\_Numbers\\_2019\\_Report.pdf](https://www.ukmusic.org/assets/general/Music_By_Numbers_2019_Report.pdf) [Last Accessed September 21, 2020]. According to Sound Diplomacy, in 2017, Wales generated £115 million through music, of which £55 million was made through live concerts and £61 via festivals. See Sound Diplomacy (2019), ‘Cardiff: Music Ecosystem Study and Strategic Recommendations’. Available at: <https://cardiff.moderngov.co.uk/documents/s29331/Cabinet%2018%20April%202019%20Music%20Ecosystem%20study%20App%201a.pdf> [Last Accessed September 21, 2020].

<sup>9</sup> Sound Diplomacy. ‘Cardiff: Music Ecosystem Study and Strategic Recommendations’.

All of this contrasts very sharply with the well-publicised and very alarming ‘Covid-19 narratives’ that began to emerge in March 2020, which reported on the cancellation of artist tours, music festivals,<sup>10</sup> not to mention the impact of the pandemic on rehearsal rooms, recording studios, music retail (‘record’ shops and musical instrument and technology sales’), music tuition (both formal and informal), grassroots music venues and concert halls. In May, the UK Live Music Group (part of UK Music) reported how they expected as much as £900 million to be “wiped from the £1.1 billion the [UK] live music sector was expected to contribute to the domestic economy this year” with 82% of grassroots music venues in threat of closure—550 in total.<sup>11</sup> Indeed in a Department for Digital, Culture, Media and Sport (DCMS) select committee report dated July 23<sup>rd</sup>, evidence given by the Music Venue Trust (MVT) estimated that 93% of grassroots music venues across the UK faced permanent closure, with “86% of venues reporting that their core threat stems from an inability to meet commercial rent demand”.<sup>12</sup> Additionally, the National Arenas Association projected a loss of £235 million over a six month period for the venues it represents across the UK.<sup>13</sup>

All of these issues, which are so pervasive across the UK, also have a specific Welsh impact, with examples including the cancellation of iconic events such as the Greenman Festival, Brecon Jazz and Focus Wales, the temporary closure of major touring venues such as St Davids Hall, The Motorpoint Arena and Wales Millennium Centre, in addition to facilities such as C.O.B.R.A Studios (in Newport), Monnow residential recording studios (in Monmouth), Musicbox rehearsal studio (in Cardiff) and grassroots venues such as The Moon (in Cardiff) and The Tivoli (in Flintshire). These examples are of course microcosms of a

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<sup>10</sup> For a list of festivals from around the world that have been cancelled, see <https://sickfestivals.com>

<sup>11</sup> James Hanley (2020), ‘UK Live Music Group Calls For Urgent Government Action Amid Catastrophic Coronavirus Impact’. Available at: <https://www.musicweek.com/live/read/uk-live-music-group-calls-for-urgent-government-action-amid-catastrophic-coronavirus-impact/079731>

<sup>12</sup> DCMS (2020), ‘Impact of Covid-19 on DCMS Sectors’. Available at: [https://publications.parliament.uk/pa/cm5801/cmselect/cmcumeds/291/29106.htm#\\_idTextAnchor032](https://publications.parliament.uk/pa/cm5801/cmselect/cmcumeds/291/29106.htm#_idTextAnchor032) [Last Accessed September 21 2020].

<sup>13</sup> Ibid.

much larger landscape, but they help us understand how music plays a significant part in the alarming decline of the Creative Industries in Wales, which was forecast in a recent Creative Industries Federation report.<sup>14</sup>

When we consider ‘pre-covid’ times, it is important to point out that the £5.2 billion quoted above should not undermine the financial struggles experienced by the majority of music creators in Wales, with a 2019 report by Sound Diplomacy estimating the average wage for Cardiff based ‘artists and creative agents’ to be around £18,000 per year,<sup>15</sup> which is below the UK national average of £23.059 for musicians according to UK Music.<sup>16</sup> The vast majority of these stakeholders of course are freelancers, with the Musicians’ Union (in 2012) estimating that 94% of musicians fit into this category,<sup>17</sup> well above the average of the Creative Industries more broadly.<sup>18</sup> However, one needs to emphasise that the Welsh music industries are not just about musicians, who have to be regarded as the ‘tip of the iceberg’, but comprised of numerous sub-sectors, who although vital to the ‘body’, are often invisible ‘parts’ when attending an event, or purchasing/streaming/downloading a piece of music for example. These roles, many of which are freelance too, include sound engineers, music producers, ticket agents, roadies, instrument technicians, booking agents, promoters, lighting crew, recording engineers, instrumental music educators, etc.<sup>19</sup> So, it is important to highlight

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<sup>14</sup> In terms of Creative Industries as an entity, the report outlines how the nation could lose 26% of its creative jobs (14,900), in addition to a 10% reduction in its Creative Industries GVA, which equates to around £100 million. See Oxford Economics (2020), ‘The Projected Economic Impact of Covid-19 on the UK Creative Industries’. Available at: [https://www.creativeindustriesfederation.com/sites/default/files/inline-images/20200619\\_OE\\_Slides.pdf](https://www.creativeindustriesfederation.com/sites/default/files/inline-images/20200619_OE_Slides.pdf) [Last Accessed September 21 2020].

<sup>15</sup> See Sound Diplomacy. ‘Cardiff: Music Ecosystem Study and Strategic Recommendations’.

<sup>16</sup> The aforementioned UK Music Report *Music by Numbers* (2019) also cites this figure as being well below the generic national average wage of £29,832.

<sup>17</sup> See Musicians’ Union (2012), ‘Music By Numbers’. Available at:

<https://www.musiciansunion.org.uk/Files/Reports/Industry/The-Working-Musician-report> [Last Accessed September 21, 2020]. According to UK Music (*Music By Numbers*, 2019), this percentage complies with the research of the Music Producers Guild. The 2019 UK Music *Music By Numbers* report also cites research by the Department of Digital, Culture, Media and Sport (DCMS), which estimates 72% of those working in music, performance and visual arts are self-employed.

<sup>18</sup> Comparing it to the 15% in the general workforce, The Creative Industries Federation estimate that 47% of Creative Industries creative workers are self-employed. See

<https://www.creativeindustriesfederation.com/publications/creative-freelancers>

<sup>19</sup> For a more substantive list of these sub-sectors, see Appendix 2.

that Covid-19 has impacted all of these sub-sectors too, in addition to a host of ‘knock on’ stakeholders that rely on music to be produced and performed, such as hotels, public transport, restaurants, bars, etc. As an indicative example, a recent article in the Guardian in August 2020 highlighted the plight of music event staff (which include stakeholders such as sound and lightening technicians, catering, tour managers, bus drivers, instrument technicians and merchandise sellers), who after discovering their working year had ended in March, found they had no work or money, with those who are eligible having to rely on the Self-Employment Income Support Scheme, savings, universal credit, other non-music industry related jobs, or furlough.<sup>20</sup>

This report for the Culture, Welsh Language and Communications Committee, will initially outline in Chapter 1 the contextual backstory of the emergence of private and public support for the music industries in Wales since the pandemic commenced, with the later falling into the following categories: ‘music specific’(for example the Grassroot Music Relief Fund managed by Creative Wales), ‘creative/performing arts sector specific (For example the £53 million ‘Cultural Recovery Fund’ allocated in July to the arts and culture sector as part of the £59 million allocated to Wales by the UK government), or indeed focused pan UK/pan sector, via the Coronavirus Jobs Retention Scheme (CJRS) or the Self-Employment Income Support Scheme (SEISS). Due to many music industry stakeholders being ineligible for any of this public funding, this initial chapter will also outline the pan UK private sector initiatives instigated by the likes of Help Musicians UK, the Musicians’ Union and the Association of Independent Musicians.

Chapter 2 begins by examining advice given to the music industries by the UK and Welsh Governments concerning roadmaps out of the pandemic, with both noted as being on

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<sup>20</sup> Michael Hann (2020), ‘I Feel Like I am Failing at Life: The Terrible Plight of Music Event Staff’, *The Guardian*, Available at: [https://www.theguardian.com/music/2020/aug/15/the-terrible-plight-of-music-event-staff-coronavirus-pandemic?CMP=share\\_btn\\_fb](https://www.theguardian.com/music/2020/aug/15/the-terrible-plight-of-music-event-staff-coronavirus-pandemic?CMP=share_btn_fb) [Last Accessed September 21, 2020].



similar trajectories, although implementing distinct methodological approaches. As the pandemic progressed, these distinct approaches have resulted in Welsh performance venues still not being open for business, which caused concern and at times confusion, as other nations such as Germany, the Republic of Ireland, France, Finland and indeed England appeared to have clearer more rapid protocols.

In order to provide further context on the impact of the pandemic on the Welsh music industries, chapter 3 focuses on current research, ranging from UK based industry surveys (including the analysis of a project instigated by the Forté Project) to academic research, including journal articles, research projects, symposia and more informal ‘thought pieces’.

Entitled ‘What Wales Can Learn and How Does it Compare to Other Nations’, chapter 4 initially compares the support packages of the Home Nations, before examining available support mechanisms in other parts of the world. The chapter highlights the problems of comparing support in Wales to many other European nations, who have a history of supplying far greater sums of money to artists and art-based organisations—which obviously leaves UK venues and other music industry stakeholders more exposed during a pandemic such as Covid-19. The chapter also highlights some of the problems with comparing ‘like for like’, with many funding packages elsewhere in the world not being clear how music is included. The chapter concludes with an overview of initiatives from nations around the world, which have been incorporated to support and kick start their respective music industries.

The report concludes by considering a series of recommendations for the Culture, Welsh Language and Communications Committee to consider, prior to making suggestions to Welsh Government.

Much of the research implemented for this report took place in ‘real time’, as developments happened and research was still emerging, factors which presented significant

challenges in terms of ensuring information was relevant, accurate and most importantly up to date. Despite this and the lack of detailed statistical data on the Welsh music industries, it is hoped that the report provides a historical record of the emergence of Covid-19 in Wales; how the public and private sector responded, its impacts on the music industries more generally; a snapshot of the measures that other nations employed; how the research community responded and most importantly; an initial consideration of the ways in which Welsh Government can expand the provision they have already provided. Although the report attempts to engage with the music industries more generally, it does focus primarily on live music. The reason for this is twofold. Firstly, as outlined in Chapter 3, live music is the sub-sector that has been impacted the most by the pandemic and secondly, it is this sub-sector which has been the focus of the Culture, Welsh Language and Communications Committee in recent months. However, due to live music being but one strand of the music ecosystem in Wales, it is hoped that the report offers insights for all music sectors—particularly in its recommendations. The excellent work that the Culture, Welsh Language and Communications Committee has undertaken into the live music industry thus far has been somewhat undermined by the emergence of Covid-19, so it is hoped this report will feed into these findings as we progress through the ongoing impacts of the pandemic. It is also hoped that this report will highlight the ‘knowledge gaps’ prevalent in the Welsh Music Industries, which is in real need of detailed statistical data regarding the role music plays in the economy, the impact of covid-19 on its sub-sectors and the financial and cultural contribution the music industries contribute to Wales’ economy.

Closing this brief introduction, I would like to thank the music industry stakeholders who have assisted me in appreciating the impact the pandemic has had on their livelihoods and careers. I would also like to thank Spike Griffiths for allowing me to access the data of his Forté project survey; Mark Davyd and Stu Fletcher from the Music Venue Trust for

providing a list of venues it represents in Wales alongside important contextual information; Dave Ball from Creative Wales and all of the freelance musicians who answered my queries about the details of Covid-19 on their careers. I would also like to thank Luke Thomas, Dr. Sam Murray and Robin Wilkinson for proofreading early drafts and John Rostron for providing invaluable advice regarding the recommendations. Last but not least, I want to thank my employers the University of South Wales, for giving me the necessary space to dedicate time to writing this report.

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October 2020

## **Chapter 1: UK Based Public and Private Body Support for the Music Industries**

In terms of public body support for the music industries since the onset of Covid-19, the initial response of the UK government was to announce an unprecedented £350 billion-pound financial package, which was announced pre Lockdown on March 17<sup>th</sup> and aimed principally at employed workers.<sup>21</sup> The purpose of this taxable grant was to safeguard jobs by paying employees up to 80% of their monthly wages (averaged over the last three years, up to a maximum of £2,500 per month) while the economy ‘got back on its feet’, with the scheme being implemented in two parts—the first from March 1<sup>st</sup> to the end of May and the second from the beginning of June until the end of October. Although excluding the many self-employed workers in the music industries, what was to be known as the Coronavirus Jobs Retention Scheme (CJRS) did supply financial assistance for employed staff, such as those that worked for music venues and record companies for example. On September 24<sup>th</sup> as part of the Chancellor of the Exchequer’s ‘Winter Economy Plan’, it was announced that it would be replaced by the ‘Job Support Scheme’ from November 1<sup>st</sup>. This scheme however, supported only what Chancellor Rishi Sunak described as “viable Jobs”, as “opposed to jobs that only exist because the government is continuing to subsidise the wages”.<sup>22</sup> The scheme was widely criticised by the music industries, with Mark Davyd from the Music Venue Trust stating the scheme “did not address the specific challenges faced by the music industry”, as it was based around employees returning to work, which the live music industry was not in a

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<sup>21</sup> BBC News, March 17 2020. Available at: <https://www.bbc.co.uk/news/business-51935467> [Last Accessed September 21 2020]. As with the UK Government, Welsh Government also announced a 12 month 100% cut to business rates for the hospitality, retail and leisure sectors.

<sup>22</sup> BBC News. ‘Rishi Sunak Unveils Emergency Jobs Scheme’. *BBC News*, September 24 2020. Available at: <https://www.bbc.co.uk/news/business-54280966> [Last Accessed September 25 2020]. The scheme ends on April 30<sup>th</sup> 2021 and is only applicable to employees who are working at least a third of the usual hours, with the remaining two-thirds of their hours financed equally between the employer and the government. Government contribution is capped at £697.92.

position to do.<sup>23</sup> As various parts of the UK went into local lockdown in October, the UK Government announced that the Job Support Scheme would be postponed, with the existing furlough scheme extended beyond November 1<sup>st</sup>.

On March 26<sup>th</sup>, UK Music reported that after increasing pressure, UK government support for those who were *currently* self-employed was also forthcoming, with the introduction of the Self-Employment Income Support Scheme (SEISS), a scheme which was initially to last up to three months (between March 1<sup>st</sup> to May 31<sup>st</sup>—claimable up to July 13<sup>th</sup>, 2020) and applying to those who had trading profits of up to £50,000 per year.<sup>24</sup> Those claiming the grant (which was offered as a single lump sum and based on 80% of monthly profits up to a maximum of £2500) also had to prove they were adversely impacted by the pandemic—which was not problematic for many stakeholders in the music industries, providing they were eligible for the fund.<sup>25</sup> An extension of the UK government’s SEISS scheme, advertised as the “final grant”,<sup>26</sup> was announced on May 22<sup>nd</sup>, informing stakeholders that the grant would be claimable between August 17<sup>th</sup> and October 19<sup>th</sup>. This time however the grant, which encompassed the June 1<sup>st</sup> to August 31<sup>st</sup> time period, was to cover a reduced 70% of average monthly trading and was capped at £6,570 in total. Despite the chancellor of the exchequer stating that the first instalment would not be paid until June 1<sup>st</sup>, causing consternation within some industry circles, informal conversations with those who accessed the scheme indicated that payment was prompt, with limited administration, with an optional webinar describing the application process if required. When speaking to the

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<sup>23</sup> James Hanley, ‘Music Venues Trust Responds to Chancellors Statement’. *Music Week*, September 24 2020. Available at <https://www.musicweek.com/live/read/music-venue-trust-responds-to-chancellor-s-statement/081274> [Last Accessed September 25 2020].

<sup>24</sup> UK Music, March 26<sup>th</sup> 2020, ‘UK Music Chief Welcomes Lifeline For Self Employed-But Calls on Government to Offer Urgent Help’. Available at: <https://www.ukmusic.org/news/uk-music-chief-welcomes-lifeline-for-self-employed-but-calls-on-government> [Last Accessed September 21 2020].

<sup>25</sup> See <https://www.gov.uk/guidance/claim-a-grant-through-the-coronavirus-covid-19-self-employment-income-support-scheme#check>

<sup>26</sup> <https://www.gov.uk/guidance/claim-a-grant-through-the-coronavirus-covid-19-self-employment-income-support-scheme#extension>

aforementioned stakeholders, they verified that payment came around a week after the webinar (if it was taken) and often prior to June 1st. One of the main issues that emerged from these informal discussions surrounded the average wage the scheme was based on, with one stakeholder (a well-established professional bass player) stating his final package worked out as 8.25 gigs over three months—less than one a week. Another Welsh based professional drummer discussed having to take up a day job, as the scheme did not take into account that the majority of many musicians’ earnings take place during the summer festival period, with his UK Government support falling well below what he would normally be earning. Although not detailed research, these examples provide an indicative feel for the financial hardships many music industry stakeholders were/are experiencing, despite accessing financial assistance. This will be elaborated on in the research section of this report.

Despite the music industries overwhelmingly supporting the SEISS, UK Music were still compelled to point out the need for “immediate and urgent help”,<sup>27</sup> sentiments which were echoed by private sector organisations such as the Musicians’ Union, the Creative Industries Federation,<sup>28</sup> the Music Managers Forum (MMF) and the Association of Independent Music (AIM).<sup>29</sup> Recognising the need for immediate financial support for those who are not registered self-employed; have not been registered long enough; or earning over £50,000 per year, a number of private sector industry bodies set up advice links, including the

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<sup>27</sup> UK Music, March 26<sup>th</sup> 2020, ‘UK Music Chief Welcomes Lifeline For Self Employed-But Calls on Government to Offer Urgent Help’.

<sup>28</sup> Mark Sutherland, March 26 2020, ‘Music Biz Reacts to Government’s Aid Package for Self Employed Workers’, *Music Week*. Available at: <https://www.musicweek.com/media/read/music-biz-reacts-to-government-s-aid-package-for-self-employed-workers/079310> [Last Accessed September 21 2020].

<sup>29</sup> Richard Smirk, March 26 2020, ‘UK Music Industry Welcomes ‘Vital Lifeline’ for Self Employed, But Warns Two Months Wait Too Long’, *Billboard*. Available at: <https://www.billboard.com/articles/news/international/9344388/uk-music-industry-self-employed-coronavirus-support> [Last Accessed September 21 2020].

Musicians' Union,<sup>30</sup> UK Music,<sup>31</sup> MMF,<sup>32</sup> the British Phonographic Industry (BPI)<sup>33</sup> and the Music Producers Guild.<sup>34</sup> These bodies provided guidance ranging from generic factors such as hygiene, social distancing, financial advice, travel, working from home, insurance, when to self-isolate and mental health/well-being, to more specific music activities such as touring, concert cancellations and suggested working practices of recording studios. In early October, the UK government announced that an extension to the self-employment scheme would be put in place, although at a reduced level, with the first of two grants covering 20% of monthly trading profits, up to £1,875.<sup>35</sup>

Additional financial support schemes provided by the private sector early on in the pandemic included the £1 million donation-based Musician Union Hardship fund, which allocates a one off £200 for paid up UK based members in need of immediate assistance. In their guidance, the Musicians' Union point out that the fund was not aimed at replacing fees (i.e cancelled gigs), but for those "in dire need of financial help".<sup>36</sup> The fund, which received over 200 claims within the first 2 hours of launching, is still ongoing and receiving donations.<sup>37</sup> The Association of Independent Musicians (AIM) also launched a donation based 'crisis fund' in April, aimed at freelancers and self-employed contractors facing financial hardship. The scheme is open to AIM member businesses (which includes stakeholders such as record labels, music entrepreneurs and artists) , in addition to

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<sup>30</sup> See Musicians' Union, 'Find Advice and Read the Latest News on Coronavirus for Musicians'. Available at <https://www.musiciansunion.org.uk/coronavirus> [Last Accessed September 21 2020].

<sup>31</sup> UK Music. 'Covid-19'. Available at: <https://www.ukmusic.org/covid-19/> [Last Accessed September 21 2020].

<sup>32</sup> Music Managers Forum, 'Covid-19 Key Points for Members'. Available at: <https://themmf.net/2020/03/10/coronavirus-updated-information/> [Last Accessed September 21 2020].

<sup>33</sup> British Phonographic Industry, 'Covid-19 Advice'. Available at: <https://www.bpi.co.uk/news-analysis/covid-19-useful-information/> [Last Accessed September 21 2020].

<sup>34</sup> Music Producers Guild, 'Coronavirus Covid-19 Update (24/3/20)'. Available at: <https://mpg.org.uk/news/covid-19-coronavirus-update-24-03-20/> (Last Accessed September 21 2020).

<sup>35</sup> See <https://www.gov.uk/government/publications/self-employment-income-support-scheme-grant-extension/self-employment-income-support-scheme-grant-extension>

<sup>36</sup> See <https://www.musiciansunion.org.uk/HardshipFund>

<sup>37</sup> <https://www.musiciansunion.org.uk/Donate>

“developing artists signed to those businesses and contractors due to work with those artists who have lost committed income because of cancelled projects”.<sup>38</sup> Adding to the list of music industry stakeholders outlined in the introduction of this report, AIM outline “record labels, artist managers, tour crews, session musicians, studio producers, mixing engineers, radio pluggers, graphic designers, stylists, photographers, publicists and more” as “critical part[s] of the music industry ecosystem”, with all being eligible to apply for grants of up to £1000, for each two month period.<sup>39</sup> Ran over a number of ‘phases’, the Help Musicians UK Hardship fund was aimed at musicians who were not eligible for government support or could not survive on what they were currently receiving.<sup>40</sup> The second phase of the scheme, comprised of £2 million from the charity’s reserves, £500,000 from Phonographic Performance Limited (PPL) and £50,000 from the Lightbody Foundation, was focused on offering finance to musicians who were “left with nothing but universal credit, or are struggling to survive with what little other support they receive[d]”,<sup>41</sup> with payments actioned between June 1<sup>st</sup> to October 31<sup>st</sup>. Although now closed, the £2.1 Million Performing Rights Society (PRS) Emergency Relief Fund offered grants of up to £1000 to all members suffering ‘genuine hardship’, around the world who had earned over £500 in royalties in the preceding two years. The organisation does however continue to offer its longstanding ‘PRS Members Fund’, which provides short term loans and ‘unexpected crisis grants’.<sup>42</sup> The Royal Society of Musicians of Great Britain, also offered financial assistance to current and former professional musicians and their families, with focus based upon factors such as illness, lack of earning care (for example looking after a spouse) and recuperation.<sup>43</sup> As a final example,

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<sup>38</sup> See <https://www.aim.org.uk/#!/news/aim-crisis-fund-opens-to-wider-applications>

<sup>39</sup> <https://www.aim.org.uk/#!/news/aim-crisis-fund-opens-to-wider-applications>

<sup>40</sup> Help Musicians, ‘Advice Relating to Coronavirus (Covid-19)’. Available at: <https://www.helpmusicians.org.uk/news/latest-news/advice-relating-to-coronavirus-covid-19> [Last Accessed September 21 2020].

<sup>41</sup> Ibid.

<sup>42</sup> <https://www.prsformusic.com/what-we-do/who-we-work-with/prs-members-fund>

<sup>43</sup> <https://www.rsmgb.org/wp-content/uploads/2020/01/RSM-assessing-applications-web.pdf>. For an article outlining additional UK based funds during the pandemic, see Olivier Gable (2020), “‘A Drop in the Ocean’?”



Youth Music announced grants of between £5,000 and £30,000, targeted specifically towards businesses, not for profits and collectives working in the music industries, with a focus of opening up sustainable careers in a post covid world, for young people in the 18-25 age bracket.<sup>44</sup> Although phase 1 of the funding ceased on August 14<sup>th</sup>, a second phase has been announced to commence in February 2021.<sup>45</sup>

This ‘gap in support’ that many of these schemes target continues to be important, with Help Musicians UK research indicating that 25% of musicians would not be eligible for the UK Government’s self-employment scheme,<sup>46</sup> which despite music industry lobbying, adhered to its original target group. Indeed, as indicated by Anny Shaw of *The Art Newspaper* in May 2020, although chancellor of the exchequer Rishi Sunak assured in March that the SEISS would cover 95% of self-employed workers,<sup>47</sup> HMRC are now confirming the figure to be closer to 66%.<sup>48</sup> Indeed as confirmed in a Culture Welsh Language and Communications Committee Creative Industries report dated July 2020,<sup>49</sup> although the SEISS and CJRS were most welcome, “they were [deemed] not suitable for freelance workers”, with Cardiff University’s Sara Pepper estimating that half of the 80,000 creative workers in Wales were freelance and have fallen through the gaps.<sup>50</sup> In an earlier Culture Welsh Language and

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Funding and Support for UK Musicians in the Covid-19 Crisis’. Available at: <https://wim.hypotheses.org/1383>. [Last Accessed September 21 2020].

<sup>44</sup> <https://new.youthmusic.org.uk/incubator-fund>

<sup>45</sup> For an overview of other music industry funds available in various parts of the world, see Stuart Dredge (2020), ‘Mapping the Covid Impact on the Music Industry’. Available at: <https://blog.midem.com/2020/05/mapping-the-covid-impact-on-the-music-industry/> [Last Accessed September 21 2020].

<sup>46</sup> See <https://www.helpmusicians.org.uk/news/latest-news/second-phase-of-charitys-covid-19-financial-hardship-funding>

<sup>47</sup> Danielle Sheridan, ‘Rishi Sunak Unveils Bailout for Self-Employed, But Admits it will Not Be Available Until June’, *The Daily Telegraph*, March 26 2020. Available at: <https://www.telegraph.co.uk/politics/2020/03/26/self-employed-help-government-sunak-coronavirus-boris-johnson/> [Last Accessed September 21 2020].

<sup>48</sup> Anny Shaw, ‘Masses of Artists Rejected by UK Government’s Self-Employment Support Scheme’, *The Arts Newspaper*, May 19 2020. Available at: <https://www.theartnewspaper.com/news/masses-of-artists-fail-to-qualify-for-uk-government-s-self-employment-support-scheme> [Last Accessed September 21 2020].

<sup>49</sup> Welsh Parliament, Culture Welsh Language and Communications Committee, ‘Impact of the Covid-19 Outbreak on the Creative Industries’, July 2020. Available at: <https://senedd.wales/laid%20documents/cr-ld13352/cr-ld13352-e.pdf> [Last Accessed September 21 2020].

<sup>50</sup> *Ibid.*

Communications Committee report related to the impact of Covid-19 on the arts sector, Nick Capaldi outlined a similar story, with freelancers regarded as not able to “rely on the safety nets available to employees, and that the SEISS and CJRS were “not fit for purpose [...] because many individuals can’t offer a track record of financial accounts”.<sup>51</sup> When questioned about this trend in the music industry specifically, Mark Davyd from the Music Venue Trust (MVT) outlined that “because the returns for being a musician are so low, many musicians have constructed their economic model to maximise their ability not to be involved in tax or national insurance”.<sup>52</sup>

Giving evidence to the Culture, Welsh Language and Communications Committee on June 24 2020,<sup>53</sup> Davyd reported that although the grassroots music sector technically ‘shut down’ on March 21st, the downturn in trade started before then, with the public, who were obviously beginning to understand the impacts of Covid-19, beginning to ‘vote with their feet’ and not attend shows. Davyd, who confirmed that MVT has a number of venues represented in Wales, also outlined how the impact of lockdown had gone well beyond the well-publicised venue owners and musicians, to include many of the extended stakeholders indicated above.<sup>54</sup> When questioned, Davyd also verified what he thought to be the ‘excellent support measures in Wales’, considering Welsh grassroot venues to be the least in debt (in terms of the UK), due to ‘very effective’ interventions from Creative Wales and Arts Council

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<sup>51</sup> Welsh Parliament, Culture Welsh Language and Communications Committee, Impact of the Covid-19 Outbreak on the Arts’, June 2020. Available at <https://senedd.wales/laid%20documents/cr-ld13215/cr-ld13215%20-e.pdf> [Last Accessed September 21 2020].

<sup>52</sup> Davyd, in conversation with Paul Carr, July 25<sup>th</sup>, 2020. A DCMS report dated July 23<sup>rd</sup> also verified that many freelancers had received no support at all. See DCMS (2020), ‘Impact of Covid-19 on DCMS Sectors’.

<sup>53</sup> See <http://senedd.tv/Meeting/Archive/1397f2fa-4949-4611-96fb-b9bf507ced04?autostart=True>

<sup>54</sup> For a list of these 55 venues – see Appendix 1.

Wales.<sup>55</sup> Indeed when speaking to Davyd in July, he confirmed that that Government support within Wales was “significantly in excess to that of any of the other three [UK] nations”.<sup>56</sup>

The funding that Davyd is referring to was the £401,551.39 allocated to 22 grassroots music businesses across Wales,<sup>57</sup> as part of a £1 million fund allocated to a ‘Creative Wales Fund’ (up to £25,000 per business), which also included “additional support for the TV and publishing sectors to allow them to consider future opportunities”.<sup>58</sup> Announced on April 1<sup>st</sup> and specifically aimed at supporting those who were not musicians, this funding was itself encapsulated within the Welsh Government’s £18 million support scheme targeted specifically at the culture, creative and sports sectors of Wales.<sup>59</sup> Also encompassed within this, was the £7 million ‘Arts Resilience Fund’, led by Arts Council Wales.<sup>60</sup> The fund, which was targeted toward both individuals (£1.5 million) and organisations (£5.5 million) “who were at most urgent risk”,<sup>61</sup> was subdivided into three ‘phases’—the ‘Urgent Response Fund’ (launched on April 14<sup>th</sup>), The ‘Stabilisation Fund for Individuals’ (launched on April 21<sup>st</sup>) and finally the ‘Stabilisation Fund for Organisations’ (launched on May 29<sup>th</sup>).<sup>62</sup> In terms of its relevance to freelancers in the music industries, Phase 1 included a grant of £2,500 and was aimed at individuals who required urgent financial assistance, which was followed up in

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<sup>55</sup> The venues were reported to be collectively around £120,00 in debt, ranging from those that are in a similar position to before, to those carrying significant debt.

<sup>56</sup> Davyd in conversation with Paul Carr, July 24<sup>th</sup> 2020. In the interview, Davyd also confirmed that the average grassroots music venue debt in England is around £25,000-£30,000, whereas in Wales it is as low as 2 or 3 thousand pounds.

<sup>57</sup> Welsh Parliament (2020), ‘Support for Grassroots Music Venues in Wales’. Available at: <https://gov.wales/support-grassroots-music-venues-wales> [Last Accessed September 21 2020].

<sup>58</sup> Grantfinder, ‘Funding for Wales’ Arts Culture and Sports Sectors During Covid-19 Outbreak’, *Grantfinder*, April 2 2020. <https://www.grantfinder.co.uk/coronavirus/funding-for-wales-arts-culture-and-sports-sectors-during-covid-19-outbreak/> [Last Accessed September 21 2020].

<sup>59</sup> Welsh Government, ‘£18m Support for the Culture, Creative and Sports Sector in Wales’, *Welsh Government*, April 1 2020. Available at: <https://gov.wales/18m-support-culture-creative-and-sport-sector-wales> [Last Accessed September 21 2020]. This money was not ‘new’, but repurposed finance already allocated to these sectors.

<sup>60</sup> Arts Council of Wales, ‘Arts Council of Wales Announces Resilience Fund For the Arts in Wales’, April 1 2020. Available at: <https://arts.wales/news-jobs-opportunities/arts-council-wales-announces-resilience-fund-for-arts-wales> [Last Accessed September 21 2020].

<sup>61</sup> Ibid.

<sup>62</sup> See <https://arts.wales/funding/coronavirus>

phase 2 with a more substantive grant (between £1,000 and £10,000) focused toward assisting freelance artists and practitioners in the ‘not for profit’ sector to develop alternative ways of working. The final phase, was aimed at ‘not for profit’ businesses (including Arts Council Revenue Funded Organisations) who were experiencing loss of income and/or cashflow pressures, with a specific focus on keeping them solvent.<sup>63</sup>

In terms of the £401,551.39 allocated to 22 grassroots music businesses across Wales, Creative Wales produced a document outlining ten case studies, all of which initially gave venue owner/manager perspectives of the importance of grassroots live music venues to Wales’ culture, describing them as “vital to wellbeing”, “research and developments labs” and the “lifeblood of the industry”.<sup>64</sup> This was followed by all ten case studies describing the negative impact of the pandemic, with Samantha Dabb from Newport’s Le Pub for example reflecting on how the pandemic had brought Le Pub’s income “to zero”, having to cancel “over 50 gigs in the first three months alone”. Similarly, Bernie Plain from Musicbox Studios in Cardiff discussed how Covid-19 had “decimated [...] bookings] and had brought into sharp focus the symbiotic working relationship his studio had with music venues: “If there are no bands playing gigs, then the need to rehearse goes with it. Equally, if rehearsal studios suffer, then bands do not have the infrastructure to be ready to go and perform”.<sup>65</sup> Needless to say, the impact of this cultural intervention finance was essential in keeping these venues sustainable, with Samantha Dabb, who only a few months earlier had informed the Culture Welsh Language and Communications Committee enquiry into live music that she didn’t “know who Arts Council of Wales are or how to access them”,<sup>66</sup> verifying how the funding in the first eight weeks of lockdown enabled her to “pay her suppliers”, some artists, in

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<sup>63</sup> Ibid.

<sup>64</sup> Welsh Government (2020), ‘Grassroots Music Relief Fund Case Studies’. Available at <https://www.wales.com/creative-wales/grassroots-music-relief-fund> [Accessed September 21 2020].

<sup>65</sup> Ibid.

<sup>66</sup> See <https://record.assembly.wales/Committee/5733>

addition to “keeping a core team of staff to keep things running and plan for the future”.<sup>67</sup>

Other venues noted how they had explored alternative business models such as “online merchandising sales”, moving from “live music to events”, “doing streaming services”, moving more into catering and up skilling furloughed staff.<sup>68</sup>

As of October 2020, precisely how much of the £7 million Arts Resilience Fund was allocated to the music industries is unknown, with the Deputy Minister for Culture, Sport and Tourism reporting on September 17<sup>th</sup> that Welsh Government have not prioritised analysing impact as of yet, due to pressures of allocating the funding.<sup>69</sup> It is however well established that mainly ‘for profit’ grassroot music venues have historically experienced minimal funding from Arts Council Wales due to their focus on ‘not for profit’ organisations. Arts Council Wales does however support artists via schemes such as Forté,<sup>70</sup> Horizons 2020 and the Music Industry Development Fund. In a blog post on their website, Clwb Ifor Bach (a not for profit organisation) documented a short piece on their successful application to the ‘Stabilisation Fund For Organisations’ scheme, which is noted as assisting them to lessen the burden of their core costs, giving them “a fighting chance to survive the crisis”, in addition to enabling them to consider alternative ways to engage with audiences”.<sup>71</sup> They also report that as from March 13<sup>th</sup>, they have facilitated local artists to use Clwb Ifor Bach’s social media platforms to perform virtually and promote their work to their 66,000 followers, a model which other venues may wish to consider.

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<sup>67</sup> Welsh Government (2020), ‘Grassroots Music Relief Fund Case Studies’.

<sup>68</sup> Ibid.

<sup>69</sup> Culture, Welsh Language and Communications Committee meeting, September 17<sup>th</sup>. The Deputy Minister for Culture, Sport and Tourism also confirmed in this meeting that the £7 million was based on providing support for 2,500 individuals and was not sufficient to support everyone. See <http://www.senedd.tv/Meeting/Live/c304e92f-c4bf-4b21-a5d4-1a03b92870d0#>

<sup>70</sup> See the following reports for overviews of this historical underfunding: Music Venue Trust, ‘Music Venues Trust Response to Music Industry in Wales Response’. Available at <http://musicvenuetrust.com/wp-content/uploads/2019/06/MVT-Welsh-Inquiry-Response-2019.pdf> [Last Accessed September 21 2020] and Paul Carr (2011), ‘Investigating the Live Music Industry Within Wales: A Critical Analysis’, *The Welsh Music Foundation*. Available at: <http://livemusicexchange.org/wp-content/uploads/Paul-Carr-WMF-Report.pdf> [Last Accessed September 21 2020].

<sup>71</sup> See <http://clwb.net/blog/acw-grant-acknowledgement/>

It is important to point out that the £18 million support for the culture, creative and sports sector in Wales (and the music industry related pots within it) was a ‘cultural intervention’, which was allocated after the Welsh Government’s main intercession—‘Retail, Leisure and Hospitality Rates’ relief.<sup>72</sup> Aimed at performance venues alongside shops, pubs, restaurants, gyms and hotels, the scheme applied to eligible ratepayers with a rateable value of £500,000 or less, basically refunding local authorities who granted non-domestic rates relief. When speaking to Mark Davyd, he noted the importance of the aforementioned Creative Wales fund, which was able to assist venues who were either not able to access the main fund or it did not cover their outgoings. Describing it as “very impactful” he continued “we had a joke in our office for a couple of weeks—everyone should just move their venues to Wales—that would be a way of saving them all”.<sup>73</sup>

On July 5th, the UK Government announced what the Guardian described as a “surprisingly ambitious” £1.57 billion ‘rescue package’, targeted toward museums, galleries, theatres and music venues.<sup>74</sup> The funding, which was secured off the back of an unprecedented campaign from across the cultural industries (including music stakeholders such as the BPI, MMF and PRS, with the MVT #saveourvenues campaign obtaining support from the likes of Paul McCartney, The Rolling Stones and Ed Sheeran), culminated in a joint letter to the UK Government on July 2<sup>nd</sup> representing 1500 artists.<sup>75</sup> Although the response to the funding was overwhelmingly positive, UK Music acting chief executive Tom Kiehl did

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<sup>72</sup> Welsh Government, ‘Non-Domestic Rates: Retail, Leisure and Hospitality Rates Relief In Wales – 2020-21’. Available at: [https://businesswales.gov.wales/sites/business-wales/files/MA-RE-0992-20%20-%20Retail%2C%20Leisure%20and%20Hospitality%20Rates%20Relief%20Scheme%202020-21%20-%20Guidance%2C%20Grant%20Acceptance%20and%20Offer%20for%20Local%20Authorities%20-%20Doc%201%20Guidance%20%28E%29\\_1%20%282%29.pdf](https://businesswales.gov.wales/sites/business-wales/files/MA-RE-0992-20%20-%20Retail%2C%20Leisure%20and%20Hospitality%20Rates%20Relief%20Scheme%202020-21%20-%20Guidance%2C%20Grant%20Acceptance%20and%20Offer%20for%20Local%20Authorities%20-%20Doc%201%20Guidance%20%28E%29_1%20%282%29.pdf) [Accessed September 21 2020].

<sup>73</sup> Davyd, in conversation with Paul Carr, July 25<sup>th</sup>, 2020.

<sup>74</sup> Mark Brown, ‘Boris Johnson Pledges £1.5 bn Lifeline to Keep UK Arts Sector Afloat’, The Guardian, July 5 2020. Available at: <https://www.theguardian.com/world/2020/jul/05/boris-johnson-uk-lifeline-arts-heritage-sector-afloat> [Last Accessed September 22 2020].

<sup>75</sup> Music Business Worldwide: ‘UK Government Announces \$2BN Funding Package for the Arts-Including Music Venues’. Available at: <https://www.musicbusinessworldwide.com/uk-government-announces-2bn-funding-package-for-the-arts-including-concert-venues/> [Last Accessed September 22 2020].

outline some caution, regarding the importance of ensuring the eligibility for grants and loans was as broad as possible, “to ensure maximum take up from across the industry from those in desperate need of help, [and that] [t]hose that don’t have a track record of public funding [are not] put at a disadvantage”.<sup>76</sup> Annabella Coldrick from the Music Managers Forum (MMF) agreed with the importance of ensuring that “funding stretches beyond cultural institutions and can equally benefit artists and their teams around the UK, many of whom have fallen through gaps in support despite seeing a complete collapse in their live income”.<sup>77</sup> In the ensuing days, these concerns expanded to include questions such as how the money would be divided between the various sectors of the creative industries and how/if other music sub-sectors outside of venues (for example music festivals) would be supported. As outlined by Chris Cooke, concern was also noted “that the vast majority of the money committed by government [would] go to buildings and infrastructure rather than creators and performers”,<sup>78</sup> a point which was verified by the chief executive of MMF.

Annual research by Oxford Economics has repeatedly highlighted how music creators are responsible for almost half of the entire music industry’s contribution (GVA) to the UK economy. As any promoter will tell you, without the talent there isn’t a show. This is something we need urgent clarity on.<sup>79</sup>

In terms of how the £1.57 billion Cultural Recovery Fund compares to the rest of Europe, an interview with Mark Davyd indicated in July that “once we understand what it is going to do”, “the UK at that point will rank 5<sup>th</sup> or 6<sup>th</sup> for its cultural intervention and depending on

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<sup>76</sup> Andre Paine, ‘Music Industry Reacts to Government Support Package for Live Sector’, *Music Week*, July 6 2020. Available at: <https://prod.musicweek.com/live/read/music-industry-reacts-to-government-support-package-for-live-sector/080299> [Last Accessed September 22 2020].

<sup>77</sup> Ibid.

<sup>78</sup> Chris Cooke, ‘Music Industry Calls for Clarity on Governments £1.57bn Covid Support Scheme for the Creative Sector, *CMU*. Available at: <https://completemusicupdate.com/article/music-industry-calls-for-clarity-on-governments-1-57-billion-covid-support-scheme-for-the-creative-sector/> [Last Accessed September 22 2020].

<sup>79</sup> See <https://medium.com/@AnnabellaCF/dont-forget-the-artists-and-their-teams-when-we-save-live-music-8e6fe11cf1ac>

how that money is divided, whether it reaches grass root music venues or not, we will then know where we are in the league table of grassroots music venues”.<sup>80</sup> Most importantly, Davyd then continued to confirm that prior to any of the £1.57 billion Cultural Recovery Fund being allocated to live music, “the four nations would rank somewhere in the ‘twenties’ when it comes to the interventions that have been done, with the exception of Wales, which if treated as a separate country would be in the top ten”.<sup>81</sup> Davyd was keen to point out that this positioning was very much a rough estimate and was based on the “support available to each independent venue”.<sup>82</sup>

Norway were considered a good example by Davyd not only for the nation’s earlier opening of live performance to the general public, but how they were currently assisting performance venues while social distancing measures were taking place. He summarised the initiative as follows: “so if you run a 500 capacity room and you can only allow 200 to enter, they [the Norwegian Government] are paying [the venues] for the economic activity arising from the other 300 people [who would normally] be in the room—not just the ticket price but also an allowance for the beer they would have drunk”.<sup>83</sup> So although Wales was considered to be doing well when compared to other UK nations, it needs to be placed in context to other European nations such as France, Germany and Norway, all of which will be discussed in chapter 4 of the report. Additionally, there are still a number of problematic practices that purveys the UK as a whole. To quote Davyd

We [the UK] obviously shoot way above our weight when it comes to how we perform as a music nation, but a lot of that is driven by practices that frankly most other countries would regard as not really acceptable or ideal. People working for way below minimum wage, working extraordinary hours, scrimping and saving on

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<sup>80</sup> Davyd, in conversation with Paul Carr, July 25<sup>th</sup>, 2020.

<sup>81</sup> Ibid.

<sup>82</sup> Ibid.

<sup>83</sup> Ibid.



equipment.... [etc.]. So [the UK] is very innovative and very inventive and kind of clever because we have produced all of this music, [however] if you were to look at the 21<sup>st</sup> century about ‘how to do it’ [support live music], you would not really do it this way.<sup>84</sup>

When examining the details of the Welsh financial package, it is apparent that Welsh Government received a significant, but relatively small amount when compared to England—£59 million,<sup>85</sup> with the Welsh creative sectors immediately seeking clarity and assurances from the First Minister regarding how the finance will be spent. For example, an open letter by Plaid Cymru in July called on Welsh Government to “use solid leadership” and to carry out three specific “urgent interventions” to help save jobs”.<sup>86</sup> The letter, which was supported by prominent music industry figures such as Charlotte Church and Catrin Finch, warned that some creative industries could still “collapse within a month” without urgent action, in addition to highlighting the importance of Welsh Government showing “leadership by working with the industry to create a clear, safe and responsible plan”.<sup>87</sup> Over three weeks after the funding was originally allocated by the UK government, on July 30<sup>th</sup>, it was announced that Welsh Government would be allocating £53 million of the fund to the arts and culture sector, with the finance encouragingly targeted towards both individuals and large and small organisations, in addition to both ‘not for profit’ and commercial.<sup>88</sup> Although Welsh government were questioned by Plaid Cymru and the Welsh

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<sup>84</sup> Ibid.

<sup>85</sup> The package included £1.15 billion for cultural organisations in England (consisting of £270m in loans and £880m in grants), £100 million for England’s national cultural institutions and English Heritage and £120 million to restart construction on cultural infrastructure and for heritage construction projects in England paused because of the pandemic. Wales’ provision was part a £188 million allocation allocated specifically for the home nations, with Scotland receiving £97 million and Northern Ireland £33 million.

<sup>86</sup> ITV News, ‘Singer Charlotte Church Among Creatives Calling on Welsh Government to Use £59 Million ‘in full’ in Arts Sector’, July 6 2020. Available at: <https://www.itv.com/news/wales/2020-07-06/singer-charlotte-church-among-creatives-calling-on-welsh-government-to-use-59-million-in-full-on-arts-sector> [Last Accessed September 22 2020].

<sup>87</sup> Ibid.

<sup>88</sup> Huw Thomas, ‘Coronavirus: Arts and Culture Given £53 Million From Welsh Government’, *BBC News*, July 30 2020. Available at: <https://www.bbc.co.uk/news/uk-wales->

Conservatives as to why the full amount was not allocated, the finance was deemed as an essential intervention by Arts Council of Wales chief executive Nick Capaldi, who said the money was “the signal of support that the arts in Wales has been waiting for” and that it would “ease the immediate threat of a collapse in the creative sector”.<sup>89</sup> When the finance was initially announced on July 30<sup>th</sup>, there were no details as to how individuals and organisations could apply, although allocation of funding was noted as being dependent on a ‘cultural contract’, requiring applicants to commit to factors such as fair work, pay and sustainability, in addition to greater boardroom diversity and “support of initiatives allowing the arts to be prescribed as health treatment”.<sup>90</sup> Over the coming weeks, it emerged that the funding would be allocated solely toward ‘emergency funding’ (i.e. preventing redundancies) essentially aimed at keeping the sector going until March 2021. It is therefore clear that any finance aimed at rebuilding, will have to come from another, yet undisclosed pot. It was also announced that both Welsh Government and the Arts Council of Wales would manage the money, with WG allocated £25.5 million, of which £18.5 million was geared towards music venues; recording and rehearsal studios; heritage organisations; museums and archive services; libraries; events and their suppliers; independent cinema and the publishing sector.<sup>91</sup> Arts Council Wales was allocated £27.5 million (£25.5m of revenue and £2m of capital funding), geared toward theatres, arts centres, concert halls, galleries, organisations producing arts activity and organisations providing arts based participatory activity. With the Arts Council Wales and Welsh Government application windows allocated between August

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53588806?at\_custom2=facebook\_page&at\_campaign=64&at\_custom4=729EE4B6-D226-11EA-A386-A0033A982C1E&at\_custom1=%5Bpost+type%5D&at\_medium=custom7&at\_custom3=bbc\_wales\_news [Last Accessed September 22 2020].

<sup>89</sup> Ibid.

<sup>90</sup> Ibid.

<sup>91</sup> According to the WG website, freelance practitioners were also allocated £7 million, through which they can apply for grants of £2,500. See <https://gov.wales/find-out-if-you-are-eligible-support-cultural-recovery-fund>. This fund was managed by Local Authorities and contentiously was allocated on a ‘first come first serve’ basis. According to the BBC, the Cardiff Council allocation ran out after 50 minutes. See Huw Thomas, ‘Covid Fund for Freelancers in Wales Sees High Demand’. *BBC News*, October 7 2020. Available at: <https://www.bbc.co.uk/news/uk-wales-54424023> [Last Accessed October 12 2020].

14<sup>th</sup> and September 9<sup>th</sup> and September 14<sup>th</sup> and October 2<sup>nd</sup> respectively, as of the end of October, there is currently no data outlining how it has impacted the music industries.<sup>92</sup>

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<sup>92</sup> Welsh Government's £7 million 'Freelancers Fund' did not open until October 5<sup>th</sup>. See <https://gov.wales/wales-launches-fund-support-creative-freelancers-affected-covid-19>

## Chapter 2: Roadmaps Out of Lockdown

In response to the UK Government's perceived lack of clarity regarding its 'three step roadmap on how the UK would relax Lockdown measures in May',<sup>93</sup> UK Music called for the establishment of a 'music industries taskforce', aimed specifically at assisting the navigation of both Lockdown and the route out of it. This plan, which did not apply directly to the devolved administrations (including Wales), had a range of recommendations, including suggestions when one should work from home, when schools could open, freedom of movement between countries, to more economic based factors such as when the hospitality and retail sector could start trading. With all devolved nations responding to the pandemic using different methodologies and times scales, it at times resulted in confusion amongst the general public, with the difference between the Welsh and English guidelines being considered vague by some.<sup>94</sup> When responding to Boris Johnson's 'English' proposals, UK Music Chair Tom Watson welcomed the moves to reopen businesses but emphasised that public health remained a priority and that the roadmap "added to uncertainty in the music industry about when different sectors would emerge from the lockdown".<sup>95</sup> Watson's main concern was related to those businesses like the live music industry who, for public safety related reasons, could not return to work and even if they could, social distancing regulations had the impact of making their businesses financially unviable. It was therefore deemed essential that the aforementioned taskforce was established "to ensure [...] businesses and

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<sup>93</sup> Outlined in UK Government, 'Our Plan to Rebuild: The UK Government's Covid-19 Recovery Strategy, 2020', Available at: <https://www.gov.uk/government/publications/our-plan-to-rebuild-the-uk-governments-covid-19-recovery-strategy/our-plan-to-rebuild-the-uk-governments-covid-19-recovery-strategy> [Last Accessed September 22 2020].

<sup>94</sup> See London School of Economics [blog], 'Different Lockdown Rules are Confusing the Public', May 22 2020. Available at: <https://blogs.lse.ac.uk/covid19/2020/05/22/different-lockdown-rules-in-the-four-nations-are-confusing-the-public/> [Last Accessed September 22 2020].

<sup>95</sup> Watson highlighted for example "how quarantine restrictions on passengers coming to the UK by air could have a drastic impact on overseas tours and the ability of British musicians and creators to travel". See Andre Paine, 'UK Music Calls for UK Music Industry Taskforce', *Music Week*, May 12 2020. Available at: <https://www.musicweek.com/live/read/uk-music-calls-for-covid-19-music-industry-taskforce/079761> [Last Accessed September 22 2020].

events are Covid-19 secure—so [...] members can [...] plan for the months ahead [and that] “government support packages are not cut back until [the music industry] get[s] back on [its] feet.”<sup>96</sup> This last point was deemed particularly important, with Watson asking for the maintenance of government support packages such as the CJRS and SEISS (which ran out in October and August respectively),<sup>97</sup> in addition to firm clarity on when specific sectors of the music industries can return to work, comparing the UK to other nations such as Germany and the Republic of Ireland, where organisers had been clearly informed at an early stage that large events won’t begin until “at least the end of August”.<sup>98</sup>

The Welsh Government’s response to leaving Lockdown was noticeably distinct to that of England’s, with Wales tending to have a slower/more cautious response to factors such as the speed at which multiple households could meet,<sup>99</sup> the distance families could travel from the family home for exercise, the visiting of outdoor attractions and most importantly, when music could be performed, with the UK Government giving the green light for the performing arts sector to resume outdoors in England (with appropriate social distancing) from July 11<sup>th</sup> and initially indoors from August 1<sup>st</sup> (a date which was later postponed to August 15<sup>th</sup>).<sup>100</sup> In July, the UK government implemented a number of ‘trial’ performances in England to ascertain the practicalities of indoor concerts, as part of ‘phase 4’ of their five part recovery roadmap, which was aimed specifically at professional performances. However, these tests did not provide positive results, with reports of audiences ‘having to hum instead of sing’; a minimum of three metre distancing between performers

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<sup>96</sup> Ibid.

<sup>97</sup> The importance of extending this scheme was also pointed out in a DCMS report published on July 23<sup>rd</sup>. See DCMS (2020), ‘Impact of Covid-19 on DCMS Sectors’.

<sup>98</sup> Ibid.

<sup>99</sup> See Anna Lewis, ‘The Lockdown Rules in Wales that Now Differ from England’, *Wales Online*, June 10 2020. Available at: <https://www.walesonline.co.uk/news/wales-news/coronavirus-lockdown-england-wales-difference-18229595> [Last Accessed September 23 2020].

<sup>100</sup> UK Government. ‘Performing Arts Given Green Light to Perform Outdoors’, July 9 2020. Available at: <https://www.gov.uk/government/news/performing-arts-given-green-light-to-resume-outdoors-on-july-11>. [Last Accessed September 23 2020].

and audiences; and restricted capacities and seating arrangements (due to social distancing) making the concerts financially impractical and lacking atmosphere.<sup>101</sup>

Informal conversations with stakeholders who have engaged with indoor performances in England, reveal a snapshot of the issues that will eventually be experienced in Wales, with a Welsh based tribute band reporting of a major hotel chain facilitating indoor performances, but effectively paying half the usual fee, with the band having to perform two shows (both the same) to different audiences, for the price of one. The band reported that although they usually perform in theatres, they are having to accept these conditions in order to get work. They also reported on how all of their theatre shows had been postponed to next year, in addition to voicing concerns regarding the general public having the confidence to attend in the numbers they used to. A Welsh based big band (of sixteen members), working for the same hotel chain reported the same scenario—having to play the same set twice to different audiences, who were smaller and socially distanced. Other stakeholders interviewed, all of whom worked in the ‘entertainment sector’ (mainly playing cover versions), also reported on reduced fees (from 30% to ‘marginal’), expensive hire charges (when ensembles hire a venue and charge an audience an entry fee) and lack of confidence, where they simply did not feel safe to perform—particularly in the smaller ‘spit and sawdust’ venues. One stakeholder also reported that despite it being technically possible to perform indoors in England, work was not returning in areas such as Manchester, who at the time of writing had recently implemented a local lockdown. Due to Welsh Government policy, the return to indoor and outdoor live concert performance has been far more cautious in Wales, with live music banned in cafes, restaurants, pubs and bars and music venues.<sup>102</sup>

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<sup>101</sup> BBC News. ‘Frank Turners Socially Distanced Trial Gig ‘Not a Success’’, July 29 2020. Available at: <https://www.bbc.co.uk/news/entertainment-arts-53578188> [Last Accessed].

<sup>102</sup> See Welsh Government, Coronavirus Regulations: *Frequently Asked Questions*, First Published March 27 2020. Available at <https://gov.wales/coronavirus-regulations-guidance#section-46356> [Last Accessed October 9 2020] and Welsh Government. ‘Closure of Businesses and Premises: Coronavirus (Covid-19)’. First Published

As indicated at the start of this chapter, all four ‘home nations’ produced their own guidance on the safe reopening of music venues, with Welsh Government initially producing two documents of relevance to the live music sector. First published on July 13<sup>th</sup> and last updated on August 26<sup>th</sup>,<sup>103</sup> Welsh Government’s *Culture and Heritage Destinations and Venues: Guidance for a Phased Return* document outlines a series of what it describes as ‘practical considerations’ (as opposed to ‘rules’),<sup>104</sup> which are based on scientific evidence; conversations with the cultural and heritage sectors; public confidence; and of course implementing 2-metre social distancing regulations.<sup>105</sup> The document proceeds to offer ‘general advice’, such as health and safety (including deep cleaning), equality and diversity, managing visitors, risk assessment, employee well-being, ‘test, trace and protect’ protocols, costs of opening (which Welsh Government stipulate they will not contribute toward) and how to arrange appropriate social distancing in outdoor and indoor spaces. What then follows is more specific advice for sub-sectors such as museums and galleries, historic and ancient monuments, historic buildings and gardens, libraries, cinemas, before eventually arriving at its final category ‘arts venues’—which include concert halls and theatres. After accepting that arts venues vary in size and that the reopening of the sector will be “enormously challenging”, the guidance proceeds to “acknowledge[e] that reopening cannot be about returning to the same management of audiences and facilities as existed prior to lockdown” and that there will “inevitably be a significant reduction to seating capacity”.<sup>106</sup> Additionally,

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March 24 2020. Available at: <https://gov.wales/coronavirus-covid-19-closure-businesses-and-premises-html> [Last Accessed September 23 2020].

<sup>103</sup> What is confusing however, is that new information is not highlighted, meaning the document needs to be regularly read in its entirety.

<sup>104</sup> Welsh Government. ‘Culture and Heritage Destinations and Venues: Guidance for a Phased Return, First Published July 13 2020. Available at: <https://gov.wales/culture-and-heritage-destinations-and-venues-guidance-phased-return#section-45330> [Last Accessed September 23 2020].

<sup>105</sup> In the introductory text of the original document, it stipulated that WG were working with the Arts Council of Wales to develop additional guidance, although this guidance did not emerge. The more recent version of the document states that WG were working with stakeholders “to identify when additional guidance may be helpful”. Ibid.

<sup>106</sup> Ibid.

venues are considered to have to “make significant physical and operational changes to the way that they provide access and manage how visitors move around their buildings whilst meeting social distancing requirements”.<sup>107</sup> Whilst acknowledging that no venue is currently “in a position to confidently re-book [...] future tours” and that it would be likely to take several months [...] before touring productions or orchestras will be seen live on stage”,<sup>108</sup> there is, as of October 2020, no firm solution as to how these factors, alongside the financial constraints of social distancing regulations (which equates to reduced income), enable these venues to confidently re-open. So, the question still looms large regarding how this part of the live music sector will survive once the various support schemes are terminated. There is also no solution as to how freelancers, who are considered as “sustain[ing] the arts in Wales” (many of whom have had to take up alternative employment), will be able to reengage with their profession.<sup>109</sup>

The information relating to ‘music venues’ and ‘music’ more specifically is subsumed within a document entitled *Creative Industries: guidance for a phased return*, first published on June 19<sup>th</sup> and somewhat concerningly, not updated until August 3<sup>rd</sup>.<sup>110</sup> As with the *Culture and Heritage Destinations and Venues: Guidance for a Phased Return* documentation, it begins with general advice, then turns to the creative industry sub-sectors, including a category simply entitled ‘music’. The document acknowledges the important financial contribution that the creative industries make to the Welsh economy, in addition to their part in creating a “national brand”, which helps “promote Wales and its culture and

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<sup>107</sup> Ibid.

<sup>108</sup> Ibid.

<sup>109</sup> Ibid. The Welsh Government’s three point ‘traffic light’ system is replaced by a more detailed ‘five-point roadmap’ in the UK Government plan for the performing arts sector to progress out of Lockdown, See UK Government. ‘Working Safely During Coronavirus (Performing Arts)’. First Published May 11 2020. Available at: <https://www.gov.uk/guidance/working-safely-during-coronavirus-covid-19/performing-arts> [Last Accessed September 23 2020].

<sup>110</sup> Welsh Government. ‘Creative Industries: Guidance for a Phased Return’. First Published June 19 2020. Available at: <https://gov.wales/creative-industries-guidance-phased-return-html#section-44541> [Last Accessed September 23 2020].



talent to the world”.<sup>111</sup> Once again framing the text as ‘guidance’ (not rules), it highlights the importance of employers continuing their obligations to existing employees, in addition to stakeholders such as “agency workers, contractors and ‘other people’” (my emphasis).<sup>112</sup> As with its sister document, *Culture and Heritage Destinations and Venues*, responsibility of how to return to work is firmly placed with employers, with “each organisation [asked to] apply detailed and bespoke solutions that focus on safeguarding all workers and the public, [giving] due consideration to the local communities in which they exist and operate”.<sup>113</sup> As the document proceeds, it emphasises the importance of working within public health regulations in order to reduce the risk of coronavirus spreading, offering guidance on how this is best achieved. It also confirms that it will refer to guidance produced by relevant industry bodies in England (including “the law as it applies to England”), although this must be “considered in the context to the law as it applies in Wales”, with the responsibility placed with the employer to familiarise themselves with Welsh regulations.<sup>114</sup> Before discussing each of the three creative industry sub-sectors in turn (Screen, digital and music), it offers the following advice regarding a phased return for the creative industries more broadly, including music, adapting the three point traffic light system adopted by Welsh Government to assist a range of sectors move out of lockdown.<sup>115</sup>

- *Lockdown*: Stay at home and only leave the house for essential purposes.
- *Red*: Film and TV production activity. Virtual activity in the music sector. Continuation of activity in the digital sector.

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<sup>111</sup> Ibid.

<sup>112</sup> Ibid.

<sup>113</sup> Ibid.

<sup>114</sup> Ibid.

<sup>115</sup> Ibid.

- *Amber*: Widening of production activity and events with limited audience numbers in the music and publishing sectors. Opening of book shops in line with Welsh Government plan for reopening non-essential retail.
- *Green*: Most activities resuming with precautions in place.<sup>116</sup>

Using this model as a template, as of October 2020, the music industries in Wales is still very much in the ‘red’ category, eight months after lockdown started, with ‘virtual’ activity (a term not explained) being the only form of activity permissible. The specific guidance on music is very brief, including a list of premises that must remain closed (which includes theatres, “concert halls and other live music venues” but does not include grassroots music venues by name),<sup>117</sup> followed by confirmation that Creative Wales are “working very closely with the music industry through the recently established stakeholder group representing all areas of the industry”.<sup>118</sup> The guidance document also verifies Creative Wales’ acknowledgement that the music industries are “likely to be one of the very last sectors that is able to return to any form of normal activity” and “is in need of a long term strategy for its survival”.<sup>119</sup> Although there are no details on when this will become available, conversations with their Music Development Manager confirm that both Creative Wales and Arts Council Wales are considering ‘three-year plans for the long-term development of music.’<sup>120</sup> As with other parts of the UK, there is also confirmation that discussions have taken place around ‘virtual festivals’ and other events such as “drive in concerts where artists perform on stage together, once rules allow”, but there is noted concern about the viability of

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<sup>116</sup> Ibid.

<sup>117</sup> Welsh Government. ‘Closure of Businesses and Premises: Coronavirus (Covid-19)’. First Published March 24 2020. Available at: <https://gov.wales/coronavirus-covid-19-closure-businesses-and-premises-html> [Last Accessed September 23 2020]. As of September 23<sup>rd</sup>, related premises where music activities have traditionally taken place included restaurants, pubs, wine bars, cafes, hotels, nightclubs, theatres and concert halls. Although there is confirmation that performances may be broadcast without an audience in concert halls for example, there is no mention of grassroots music venues on the list.

<sup>118</sup> Welsh Government. ‘Creative Industries: Guidance for a Phased Return’.

<sup>119</sup> Ibid.

<sup>120</sup> Ibid.

these type of events.<sup>121</sup> Although there is no further guidance on how music venues specifically are to progress out of lockdown, the document does refer to the Reopen Every Venue Safely (REVS) scheme, co-ordinated by the Music Venue Trust, which it describes as “a phased series of interactions between Government, Music Venue Trust and grassroots music venues”,<sup>122</sup> exploring the various options available to the sector when attempting to re-open. This scheme, which is a good initiative, is also available across the UK and also (via different organisers), in various parts of North America,<sup>123</sup> is not ‘tailor-made’ for Wales. It therefore remains to be seen how effective it will be for the specific set of challenges Wales faces.

On September 15<sup>th</sup>, a third, much needed document was published by Welsh Government, which was also of relevance to the music sector. Entitled *Rehearsing, Performing and Taking Part in the Performing Arts: Guidance for a Phased Return* and very much positioned as a ‘live document’, the text initially outlines how the arts “bring meaning, authenticity, and enjoyment to our everyday lives”, before purporting to offer “high level guidance for organisations and individuals in the performing arts in Wales who rehearse, present, or take part in arts activity”.<sup>124</sup> Like the other two aforementioned documents, it then proceeds to offer what can be described as ‘generic advice’ such as management of workers, social distancing, use of PPE and ventilation, before focusing on more specific arts based factors such as ‘casting and auditions’, the importance of providing space for performers and audiences and altering repertoire/reducing group sizes to facilitate social distancing. Sections 3.19 to 3.22 are of specific interest to music, offering advice on the singing and playing of

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<sup>121</sup> Ibid.

<sup>122</sup> Ibid. Similar organisations to the Music Venue Trust exist in other parts of the world. See for example the following links for America and Canada. <https://www.nivassoc.org> <https://canadianlivemusic.ca>

<sup>123</sup> Music Cities Together. ‘Reopen Every Venue Safely’. Available at: <https://www.musiccitiestogether.org/revs> [Last Accessed September 23 2020].

<sup>124</sup> Welsh Government. *Rehearsing, Performing and Taking Part in the Performing Arts: Guidance for a Phased Return*. First Published September 15 2020. Available at: <https://gov.wales/rehearsing-performing-and-taking-part-performing-arts-guidance-phased-return-html> [Last Accessed September 23 2020].

brass instruments, playing music, orchestra pits and band areas and teaching music. As in other parts of the UK, singing and playing of brass instruments is considered a high risk activity, with the guidance verifying the current information as an “initial version of the recommended guidance”, with more to follow once the scientific evidence is at hand.<sup>125</sup> Although limited in scope, the document does offer more detailed advice, on factors such as group singing, engagement with audiences (when legally possible) and the importance of risk assessment when working with larger ensembles in particular.

When considering the three aforementioned Welsh Government documents, although they are useful, one has to ask if they are fit for purpose in terms of offering the clear advice the live music industry requires. Indeed, the very fact that the live music sectors are split between three documents is in itself confusing, but most importantly, the documents do not offer targeted advice for the majority of music industry stakeholders—freelancers.

Although very much responding to the UK Government’s ‘five step roadmap’ and taking into account that the comments were prior to the allocation of the aforementioned £1.57 billion Cultural Recovery Fund, the Music Venue Trust initially outlined how the industry does not “need guidance on how to organise creative activity and connect with audiences”, but “money to survive the crisis and plan [a] route back”.<sup>126</sup> As outlined in a DCMS select committee report dated July 23<sup>rd</sup>

[W]hether it is enough to safeguard the cultural sector will ultimately depend on how long institutions remain closed or subject to social distancing, and we are concerned that freelancers and small companies will continue to fall through the gaps of Government support.<sup>127</sup>

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<sup>125</sup> Ibid.

<sup>126</sup> Jochan Embley. ‘“Get out of the Way”: Music Venue Trust Slams Government’s Plans for Restarting Live Concerts’, June 26 2020. Available at: <https://www.standard.co.uk/go/london/music/music-venue-trust-roadmap-government-plan-live-music-gigs-a4481386.html> [Last Accessed September 23 2020].

<sup>127</sup> DCMS (2020), ‘Impact of Covid-19 on DCMS Sectors’.

Comparing how Wales and the UK more generally have progressed out of lockdown by opening their cultural sectors with other nations is not a straightforward task, as the speed at which music venues are opened depend on when lockdown measures are relaxed which in turn relate to how individual countries have dealt with the pandemic. However, I will conclude this section by providing a general feel for how a sample of other nations across Europe have opened their performance venues. As can be seen in the table below mainly sourced by ‘Live Performance Europe’,<sup>128</sup> all of the nations listed had reopened their indoor open spaces to some degree as of August 1<sup>st</sup>. As indicated earlier in the chapter, both the Republic of Ireland and Germany delayed their opening times until August 10<sup>th</sup> and 31<sup>st</sup> respectively, but at least this clear delay facilitates better planning from the music industries and most importantly, enabled appropriate support networks to be put in place. Other nations such as the Czech Republic have had indoor venues open since May 11<sup>th</sup>, initially with a maximum capacity of 100, but progressively increasing to 500 by June 18<sup>th</sup>. Although masks are obligatory, no social distancing is required when seated, which is a similar policy to some airlines. Likewise, Finland and Norway commenced tentatively opening live performance venues on June 1<sup>st</sup> and May 11<sup>th</sup> respectively, with a maximum of 50 attendees, increasing to 500 from July 31<sup>st</sup> (Finland) and September 1<sup>st</sup> (Norway). How these varying opening procedures were supported by these nations will be discussed in the chapter entitled ‘What can Wales learn and how does it compare to other nations?’.

Country	Measure
Czech Republic	Live performance venues reopening from May 11th with a maximum of 100 people per hall. From May 25th up to 300 persons with one seat and one row empty in between audience (if homogenous group max 3 people can sit together). Performers & teams need to keep 2m distance. From June 18th: up to 500 people, masks are obligatory and no distance needed anymore while you are seated.
Finland	Live performance venues reopening from June 1st with a maximum of 50 people. From July 31st the audience will increase to more than 500 persons.

<sup>128</sup> See <https://www.pearle.eu/> and <https://www.culturalpolicies.net/covid-19/comparative-overview-reopening/>

France	Live performance venues reopening from July 15th.
Germany	Live performance venues reopening from August 31st, depending on the regions.
Ireland	Live performance venues reopening from August 10th.
Italy	Live performance venues reopening from June 15th with a maximum of 200 persons seated indoor and 1.000 persons seated outdoor ( audience + professionals). No standing options.
Netherlands	Live performance venues reopening from June 1st with a maximum of 30 people per hall. From July 1st, there will be no maximum, as long as people maintain a 1.5 metre distance.
Norway	Live performance venues reopening May 7th for a maximum amount of 50 persons. From June 15th the maximum amount of audiences will increase to 200 persons. Up to 500 persons in audience will be allowed from Sep 1st.
Spain	Live performance venues reopening May 11th for a maximum amount of 30 persons indoor and 200 persons outdoor. From May 26th up to 1/3 capacity with cap at 50 persons indoor and 400 persons outdoor. From June 10th with 1/2 capacity with cap at 80 persons indoor and 800 persons outdoor.
Portugal	Live performance venues reopening from June 1st.
Greece	Open-air venues are allowed to operate at 40% capacity from June 1 provided they have strict social distancing measures in place. For the other cinemas, predictions across the industry are for a late-August, early-September reopening.
Austria	Events with up to 100 persons may take place from May 29th. From July 1st, events with allocated seats may welcome 250 persons indoors and 500 outdoors, and from 1 August, 500 persons indoors and 750 outdoors. With a special safety concept and permission by the regional administrative authorities, 1.000 persons indoors and 1.250 persons outdoors are allowed. Events with standing places are limited to 100 persons until 31 August.
Estonia	From June 1st: Up to 100 persons capped at 50% capacity & 2m distance between persons
Georgia	Institutions related to entertainment, leisure and creativity reopening from July 6th. Rules include one visitor per m2 and the duration of rehearsals should not exceed 2 hours.
Hungary	From May 28th: up to 1/4 capacity & one row in between audience members. From June 18th: No restrictions for theatres and concerts if seated. Performances allowed indoors & outdoors without masks and no social distance
Serbia	Theatres, cinemas and concert venues are reopening on August 24th, with max. 500 people in the audience, obligatory masks and 1.5m distance.

## Chapter 3: Current Research on the Impact of Covid-19 on the Music Industries

### UK Based Music Industries Research

Over the course of the last six months, the pandemic has understandably instigated a need for new research which investigates the impact of Covid-19 on music industry stakeholders and society and culture at large, with the Music Managers Forum,<sup>129</sup> Featured Artists Coalition,<sup>130</sup> The Ivors Academy<sup>131</sup> and the Musicians' Union,<sup>132</sup> all launching surveys and/or gathering UK based industry data over the last few months. Although some have not made their results publicly available as of yet, the Musicians' Union suggests that a significant number of their members (the majority of whom are self-employed) will struggle financially as a result of the pandemic, with a survey in May suggesting 38% "fall[...] short of the government's assistance schemes".<sup>133</sup> Of those who do qualify for government support schemes, 26% believed "they would still struggle to survive financially in the interim period whilst waiting to receive payments".<sup>134</sup> The Musicians' Union then progress to identify the

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<sup>129</sup> Music Manager Forum. 'MMF Gathering Evidence and Data: Impact of Covid-19 on Music Makers and their Representatives. First Published March 17 2020. Available at: <https://themmfm.net/2020/03/17/mmf-gathering-evidence-and-data-impact-of-covid-19-on-music-makers-and-their-representatives/> [Last Accessed September 23 2020].

<sup>130</sup> Featured Artists Coalition. 'Covid-19 Directory'. Available at: <https://thefac.org/covid-19> [Last Accessed September 23 2020].

<sup>131</sup> UK Parliament. 'Written Evidence Submitted by The Ivors Academy Cov0159'. Available at: <https://committees.parliament.uk/writtenevidence/6033/html/> [Last Accessed September 23 2020].

<sup>132</sup> <https://www.musiciansunion.org.uk/Home/News/2020/May/Impact-Survey-Identifies-Key-Gaps-in-Current-Gover>

<sup>133</sup> The Musicians' Union. 'Impact Survey Identifies Key Gaps in Current Government Support for Self Employed Workers'. First Published May 5 2020. Available at: <https://www.musiciansunion.org.uk/Home/News/2020/May/Impact-Survey-Identifies-Key-Gaps-in-Current-Gover> [Last Accessed September 23 2020].

<sup>134</sup> Ibid. The Musicians' Union have conducted three impact polls since the pandemic commenced. Their most recent poll suggests that 47% musicians have been forced to look for work outside the music industry; 70% are unable to undertake more than a quarter of their usual work; and 36% of musicians do not have any work at all. With the Government's job retention schemes coming to an end, 65% musicians are noted as facing financial hardship, with 87% facing financial hardship as a result of the Government's income support schemes ending in October. 87% of musicians are also noted as earning less than £20,000 this year. See <https://musiciansunion.org.uk/Home/Advice/covid-19/take-action-pandemic#WriteYourMP> [Last accessed October 14 2020].

following gaps in the UK Government's self-employment scheme, all of which are applicable to Wales.

- Those who are part self-employed (i.e. less than 50% of their total annual income)
- Those who are self-employed for less than a year
- Those who run as a limited company
- Those with annual profits of over £50,000
- Those that are on maternity cover.<sup>135</sup>

In September, more research by the Musicians' Union suggested that a third of musicians could leave the industry due to the pandemic. Reasons given include lack of government support (19%), with 34% citing financial reasons. 70% of members estimated they are doing less than 70% of their regular work, with 87% believing they will struggle once the furlough scheme ends. 88% of musicians believed the UK Government had not done enough to support them. In terms of the impact on the wider music industries, General Secretary Horace Trubridge called on the UK Government to implement a 'seat matching' scheme, which would essentially double the income of many grassroots venues in England that if open, are operating at around 30% capacity. Welsh venues would of course have to open if this scheme was to work. Calling the pandemic "the biggest crisis facing the industry in 100 years", the following quote by Trubridge captures the importance of musicians to the broader music industries.

In better times, our members drive a £5bn music industry with their talent. One artist's gig will create a domino effect of jobs – from lighting technicians to ticket

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<sup>135</sup> See <https://www.musiciansunion.org.uk/Home/News/2020/May/Impact-Survey-Identifies-Key-Gaps-in-Current-Gover> [Last Accessed September 23 2020].



sellers. If one musician is out of work, you can be sure many others will be affected too.<sup>136</sup>

Although specific Welsh music industries research is very limited at the moment, as indicated in a survey instigated by the Forté Project (see below), the first two factors seems to be a particular issue in the popular music industries in Wales.

As part of a ‘rolling survey’ which is updated monthly, the Music Managers Forum unsurprisingly outlined in May that ‘live and touring’ was the sub-sector most impacted (by a considerable distance —93%), followed by ‘recording’ (52%), ‘Marketing and Promotion’ (48%) and ‘Song writing and Production’ (42%). It also estimated that 2700+ shows across the globe had been cancelled, with 3500 being ‘at risk’, with an estimated £69 million gross loss (net £36 million) having already taken place. Costs to its members that were not possible to claim back were estimated to be in the region of £3.8 million (with travel costs the vast majority), with a £74.1 million projected loss attributed to shows that will/could be cancelled over the proceeding six months, most of which were associated with shows in the UK. Loses to members outside of the live music sector were estimated to be £8.3 million gross (£1.9 net), with 65% of responders suggesting they would not be planning any releases in the foreseeable future.<sup>137</sup>

When questioning 274 promoters across the UK, internal research by the Association of Independent Promoters revealed that in the 12 months prior to covid-19, they scheduled 29044 shows across the UK, averaging 106 events per promoter. As expected, the majority of events these promoters organised took place in London and South East England (37% in total), followed by the Midlands (13%), North West England (12%), North East England

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<sup>136</sup> Will Richards, ‘A Third of Musicians Could Leave Industry due to Coronavirus, New Study Says’, New Musical Express, September 22 2020. Available at: <https://www.nme.com/news/music/a-third-of-musicians-could-leave-industry-due-to-coronavirus-new-study-says-2758172> [Last Accessed September 23 2020].

<sup>137</sup> As of July 2<sup>nd</sup>, 188 stakeholders had completed the survey. See <https://themmf.net/site/wp-content/uploads/2020/05/MMF-info-deck-may-2020-results.pdf>. For ongoing data, see <https://themmf.net/initial-questionnaire-responses-updated-weekly/>

(12%), South West England (9%), Scotland (8%), Wales (7%) and Northern Ireland (2%). In line with these statistics, the majority of promoters were based in London and South East England (39% in total), followed by the Midlands (11%), North East England (11%), North West England (8%), Scotland (8%), South West England (7%), Wales (5%) and Northern Ireland (1%). These organisations are noted as varying in size, from a single person to the largest being responsible for just under 200 employees, with the average promoter deemed to employ between 3-10 people. In email conversation with the association's Executive Chair, John Rostron, he confirmed that 46% of those surveyed were freelancers/self-employed, 40% were limited companies and 14% were not for profit. When asked what type of unrecoverable costs these promoters had experienced, the survey revealed marketing costs (21%) and costs of keeping the company operating (21%) as the most significant, followed by staff costs (13%), production costs (8%), artist deposits (7%), artist travel (7%), venue hire (7%), unpaid tickets monies (7%), agency fees (6%) and artist fees (3%). Rostron also noted that when considering all of the promoters involved in the survey, the average promoter requires £7500 to stay solvent during the crisis,<sup>138</sup> verifying that if this was not forthcoming, 47% of those surveyed would definitely not survive.<sup>139</sup>

The Ivors Academy, an association of songwriters, lyricists and authors and named after Cardiff born Ivor Novello (1893-1951), outlined how their research also indicated that 'live and touring' was the market most impacted (57%), but this time closely followed by 'songwriting and production' (38%), a factor which will be the direct result of the 'songwriter heavy' membership of the association. Their research also indicated negative impacts to the commissioning and recording of new work, in addition to production and marketing. social distancing and confidence issues presumably.<sup>140</sup>

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<sup>138</sup> Based on the total amount survey responders required, divided by 274.

<sup>139</sup> Paul Carr would like to thank John Rostron for providing this information.

<sup>140</sup> UK Parliament. 'Written Evidence Submitted by The Ivors Academy Cov0159'.

In a report on the wider impact of Covid-19 on the creative industries more generally dated June 15<sup>th</sup> 2020,<sup>141</sup> the Creative Industries Federation estimated that the UK music industries could lose at least £3 billion of its Gross Value Added (GVA) in 2020, which equates to approximately 50% of its current production and 60% of its jobs (down to 77,000 from 190,935), based on UK Music statistics. In congruence with the research of the Musicians' Union and Music Managers Forum, 'live music and touring' is regarded as being "the single largest factor contributing to the decline" (34), with it being estimated it will take "at least 3-4 years to get back to 2019 levels of business".<sup>142</sup> Although specifics are noted as being problematic to predict, songwriting based income is also considered likely to be significantly impacted in the future,<sup>143</sup> due to disruptions in recording and promotion schedules, depleted cash reserves (in particular for SMEs) and delays in investment decisions leaving gaps in release schedules.

The picture regarding the impact of the pandemic on the UK music industries is ongoing and still being realised, but a recent survey conducted by Encore Musicians suggest that 64% of the 560 responders are considering leaving the profession, with the average loss in income being £11,300. Most alarmingly, they report that 87% fewer gigs are booked between August and December 2020 than in the same period last year.<sup>144</sup>

### **Welsh Based Research**

In terms of Welsh based research, the most current and relevant documentation to date has been instigated by Spike Griffiths and the Forté Project,<sup>145</sup> who were kind enough to share

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<sup>141</sup> Oxford Economics (2020), 'The Projected Economic Impact of Covid-19 on the UK Creative Industries'.

<sup>142</sup> Ibid.

<sup>143</sup> PRS have also noted how songwriting royalties will be an issue for years to come. See Andrew Paine, 'Rights Issue: Societies Braced for Major Downturn in Licencing Revenue'. *Music Week*, May 4<sup>th</sup> 2020. Available at: <https://www.musicweek.com/interviews/read/rights-issue-societies-braced-for-major-downturn-in-licensing-revenue/079682> [Last Accessed September 23 2020].

<sup>144</sup> Peter Bacon, '64% Musicians Considering Leaving the Music Profession – Survey'. *London Jazz News*, August 24 2020. Available at: <https://londonjazznews.com/2020/08/24/64-musicians-considering-leaving-the-music-profession-survey/> [Last Accessed September 23 2020].

<sup>145</sup> A music talent development project based in south Wales, see <https://www.forteproject.co.uk/about>

their interim data. As of July 15<sup>th</sup>, their online survey had received 158 responses from across Wales, a figure which although not totally representative of the pan-Wales music industries,<sup>146</sup> is certainly detailed enough to consider initial impacts. As expected, due to the demographic that the Forté Project engages with, the majority of responders were either in bands or were solo artists (83%), aged between 16-25 (56%) and based in either Rhondda Cynon Taff (17.7%) or Cardiff (35.4%), although other responder locations included Blaenau Gwent, Bridgend, Caerphilly, Carmarthenshire, Ceredigion, Conway and Denbighshire. Although ‘rock’ was the dominant genre (20.9%) followed by ‘indie’ (10.1%) and ‘pop’ (9.5%), other genres such as hip hop, folk and blues was also represented. When asked about the impacts of Covid-19 on their engagement with music, the vast majority of responders (76%) verified it was either ‘very negative’ or ‘negative’, with reasons including “no gigs” or festivals, restrictions on collaborative rehearsals/songwriting sessions, “no access to recording studios” and cessation of merchandise sales due to no public performances. A factor not reported in the UK based data was the number of responders who conveyed how the pandemic had not only impacted them financially, but also ‘halted’ their development as musicians/music practitioners and also their careers. Some also reported how the pandemic had impacted at important career/financial ‘tipping points’, such as in the middle of tours or album release schedules, or just at the point when interest was forthcoming from the recording industry. Impacts such as this understandably resulted in issues of insecurity when considering the future. As one responder verified.

Lockdown happened at the exact time we had a new release so [we] couldn't do anything to promote it (not even live stream as rehearsal spaces closed)

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<sup>146</sup> For example it does not include the classical music sector and many of the responders are part time.

On the other side of the impact continuum, it was somewhat surprising to see 18.4% of responders consider the impacts of Covid-19 to be either 'positive' or 'very positive', with the reasons for this perspective best summarised in the following statements

I think it has given me time to be really creative. It has also given me time to reflect and appreciate the career I've chosen.

I have written more during lockdown than I ever have and have recorded many demos which show a change in our bands' songwriting that we desperately needed

Being on the furlough scheme I have had time to develop and hone my artistry.

Through lockdown I met Dave Stewart [from the Eurythmics] who otherwise would have been touring with Nile Roger's and he delved into my back catalogue and my new music and signed me to his label.

Audience[s] seem to be engaging more than usual during lockdown. Something we will use to continue to build our online platform as lockdown eases.

Related to the last comment, it was surprising that only 53.8% of responders verified they had undertaken any sort of 'online performance' during lockdown, with only 21.3% of those indicating they would do so in the future. Reasons for this ranged from lack of artist ambition and confidence ("it wouldn't have a big audience anyway"/"no one's interested at the moment"); to concerns about the difference in sound (between live and online); to lack of 'satisfaction' ("its not the same as playing face to face"); to lack of interaction with audiences; to perceptions of "far fewer numbers" who were less engaged. Although negative

perspectives such as these dominated the responses, there were a number of comments which indicated that online performances had positives.

I had a pull of about 70 people over insta[gram] and [F]acebook during my livestream which is the biggest crowd I've performed in front of. I found the experience very strange but I learned from it on how to plan and structure a livestream in the future.

To be fair, some performances have exceeded attendance at smaller gigs—well over 100 views—but, of course, these people don't pay and it's hard to gauge how connected they are to the performance.

When considering this section of the survey, it was noticeable how Covid-19, despite its understandable negative impacts and perspectives, has allowed some artists to expand their creativity and skill bases. It seems that as the Welsh music industries move forward, advice will be required on not only alternative business models which consider the monetization of a post Covid-19 environment, but also alternative models of creativity—where the ecology of music industry stakeholders are facilitated to find new ways of making, listening and engaging with music. Although some of this thinking is hypothetical at the moment, if social distancing continues, with music venues only able to admit limited audiences if at all, the question needs to be asked how these venues can be provided with the necessary technological infrastructures and training to enable them to stream the concert to an online audience. We also need to ask how it is possible to help Welsh audiences understand the cultural value of grassroots music in particular and how important it is to pay entrance fees.

Encouragingly, 91.1% of responders confirmed they had watched at least one performance online on platforms such as Facebook or Instagram, with 58.8% verifying they would continue to do so post lockdown. However, when one compares these positive standpoints of engagement as listeners against the generally very cautious perspectives of the musicians themselves, it is apparent that further research is required to understand these varying perspectives.

In terms of the online platforms that have assisted both creativity and reaching audiences, responders mentioned the use of Bandlab,<sup>147</sup> Trackd,<sup>148</sup> Twitch,<sup>149</sup> Facebook Live and Bandcamp (which were noted as waving fees in some instances),<sup>150</sup> infrastructures that were all very well established prior to the pandemic. However, a number of virtual performance environments were not mentioned, such as Periscope,<sup>151</sup> You Tube Live, Crowdcast,<sup>152</sup> Jamkazam,<sup>153</sup> Vimeo Livestream,<sup>154</sup> or more specifically Stageit, an ‘online venue’ which was in operation prior to the pandemic—hosting monetised online events of mainly independent artists.<sup>155</sup> As opposed to environments such as these being used in a random way, it is prudent for Welsh Government to consider which platforms are most appropriate for the Welsh music industries and to form relations with the necessary stakeholders in order to assist the promotion of the nation’s artists. For example, although

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<sup>147</sup> A web and mobile based environment which facilitates synchronous creativity between musicians. See <https://newatlas.com/bandlab-online-collaboration-daw-update/56776/>

<sup>148</sup> A mobile recording studio app facilitates asynchronous collaboration. See <https://www.trackdmusic.com>

<sup>149</sup> Originally intended to broadcast live or recorded gaming footage, the environment has recently been used to facilitate live music.

<sup>150</sup> Often populated with independent artists, Bandcamp is website which enables artists to upload their recorded content and sell it to the general public.

<sup>151</sup> <https://www.periscope.tv>

<sup>152</sup> An online environment specifically targeted toward webcasts – see <https://www.crowdcast.io>

<sup>153</sup> See <https://www.jamkazam.com/#>

<sup>154</sup> See

[https://vimeo.com/features/livestreaming?vcid=33590&utm\\_medium=cpc&utm\\_source=google&gclid=CjwKC-AjwmMX4BRAAEiwA-zM4Jq0W3hkx4stoC69mD4ELjBewq\\_d1GiUw0UK2Z-WEaq6-nePWKrxazRoCIZMQAvD\\_BwE&gclid=aw.ds](https://vimeo.com/features/livestreaming?vcid=33590&utm_medium=cpc&utm_source=google&gclid=CjwKC-AjwmMX4BRAAEiwA-zM4Jq0W3hkx4stoC69mD4ELjBewq_d1GiUw0UK2Z-WEaq6-nePWKrxazRoCIZMQAvD_BwE&gclid=aw.ds)

<sup>155</sup> See <https://www.stageit.com>. For additional virtual festivals see <https://networkmusicfestival.org/?fbclid=IwAR3IS4F64EHUfq9opCycPHwdlyUqY9ld-k4-wJsBinYR67yHCgq6RZp3Ioo>

platforms such as Facebook Live and TwitchTV are technically ‘free’, their content is closely monitored by both themselves and record corporations to ensure copyright is not infringed. Additionally, if artist live streaming is going to be a more important factor in the modern music industries, it is apparent that fast upload times are required in order to make the experience as intuitive and high quality as possible. In order to circumnavigate the copyright issue indicated above, it may also be possible to negotiate short term broadcast licences with the PRS?

In terms of financial support, responders (who were primarily artists) indicated they had accessed many of the UK-wide financial schemes mentioned earlier, such as PRS Foundation and ‘Emergency Relief Fund’, Help Musicians UK, Musicians’ Union and the Government SEISS and of course Universal Credit, in addition to other private sector support such as The Big Cartel Financial Relief Fund<sup>156</sup> and Patreon.<sup>157</sup> Support from within Wales was noted as deriving from Arts Council Wales, Horizons (just before lockdown) and Ty Cerdd—although it is presumed this was related to advice as opposed to finance. However, as indicated in a recent Culture Welsh Language and Communications Committee evidence meeting,<sup>158</sup> a lack of awareness of available funding in some sub-sectors (i.e grassroots) of the Welsh music industry is an issue, a factor which was also confirmed in Forté’s questionnaire. When asked why they did not apply for funding, some believed they did not require additional support because of having non-music related employment,<sup>159</sup> or due to their successful access to government initiatives such as CJRS or the Self-Employment scheme. However, many potentially eligible responders believed they were either not entitled/eligible for support or were not aware that any funding existed—perceptions that are

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<sup>156</sup> <https://blog.bigcartel.com/recap-the-big-cartel-financial-relief-fund>

<sup>157</sup> <https://blog.patreon.com/patreon-response-to-covid-19>

<sup>158</sup> See <https://london-calling-iaspm2020.com/sam-murray-middlesex-university-uk/>

<sup>159</sup> Although the questionnaire does not ask the question, many of the responders were noticeably working part-time in the music industries.



down to a simple lack of information. Interestingly, despite many responders not being aware of potential funding, when asked what areas of online support they would be interested in, all the interest was related to actual engagement with musical processes such as promotion (71%), industry knowledge (52.5%), networking (54.4%), recording production (45.6%) and live performance (38.6%), closely followed by areas such as confidence building (25.3) and well-being (21.5%). Awareness of and how to complete funding applications was not mentioned and as this is a factor which is going to become essential for the foreseeable future as the music industries adjusts to its new reality, it would be beneficial for Welsh Government, via Creative Wales, to ensure the necessary awareness and training takes place.<sup>160</sup>

### **Academic Research**

Although it is only a matter of months since the pandemic commenced, there are already a number of academic publications either published or about to be. Additionally, UK research councils have also been quick to respond, offering a number of opportunities for the university sector to consider. Although none of these initiatives are specific to Wales at the moment, they offer important insights into how Welsh Government can understand the context and impacts of Covid-19 on the global popular music industries. What follows is a selection of the emerging research, placed into broad themes that are relevant to Wales.

#### *Virtual Festivals*

Haven (2019) explores the emergence of ‘the virtual music festival’,<sup>161</sup> a term used by Welsh Government in their guidance on a phased return for the creative industries, but not

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<sup>160</sup> The only exception to this was a comment which verified interest in “a website for all UK music funding bodies with links and small explanations of what they can do to help?”. Other surveys have also been taking place across the UK, such as that implemented by the University of Liverpool/Bido Lito!. (See <https://www.bidolito.co.uk/news-covid-19-musicians-survey/>) and the University of Sussex (See [https://docs.google.com/forms/d/e/1FAIpQLSc0l7KwjkmXRuXrIsjJkbPve1ej2zEASbCTPP\\_Tl9LGnpuqTQ/viewform](https://docs.google.com/forms/d/e/1FAIpQLSc0l7KwjkmXRuXrIsjJkbPve1ej2zEASbCTPP_Tl9LGnpuqTQ/viewform)).

<sup>161</sup> Paxton Haven, ‘Virtual Music Festivals and the Re-evaluation of Connection in a Post Covid-19 Live Music Marketplace’, *Flow Journal*, July 6 2020. Available at: [https://www.flowjournal.org/2020/07/virtual-music-festivals-connection/#footnote\\_0\\_42151](https://www.flowjournal.org/2020/07/virtual-music-festivals-connection/#footnote_0_42151) [Last Accessed September 23 2020].

elaborated upon.<sup>162</sup> In the article, Haven notes how musicians around the world have used the pandemic to “test out various co-production techniques, increase their digital fan engagement, and host virtual hangouts and dance-parties”,<sup>163</sup> quoting another article by Davies,<sup>164</sup> which discusses how the virtual festival is a “new frontier of the concert-going experience as the promise of ‘virtual reality immersion’ becomes increasingly accessible”.<sup>165</sup> The article discusses how these online events are taking place on a number of platforms, in particular online video game platforms such as Minecraft and Fornite, a phenomena which James Rendell also discusses in an forthcoming article.<sup>166</sup> Haven mentions the new market position of ‘Open Pit’,<sup>167</sup> “a volunteer collective of marketing specialists, graphic designers, coders, and producers, [who] are leaders in this new virtual event planning space”. Open Pit, who worked on the virtual aspects of Coachella and Firefest festivals before the pandemic started, are considered as having a “cheeky, yet critical, engagement with the inflated contemporary music festival market”, organising “open events that, instead of aiming for wide profit-margins, donate any money made from merchandise or VIP passes to various charities”.<sup>168</sup> The company worked on two virtual festivals during the early months of the pandemic (Square Garden and #AETH3R), both of which raised funds for the ‘Feeding American’ organisation and the National Bail Fund Network. To quote Haven

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<sup>162</sup> See Welsh Government. ‘Creative Industries: Guidance for a Phased Return’. First Published June 19 2020.

<sup>163</sup> Paxton Haven, ‘Virtual Music Festivals and the Re-evaluation of Connection in a Post Covid-19 Live Music Marketplace’, *Flow Journal*, July 6 2020.

<sup>164</sup> Dean Mayo Davies. ‘Are You? Captured Together on a Rare Real World Meeting, Meet the Controversial Pop Metal Duo Living Their Best Lives Online’. *Dazed*, April 20 2020. Available at: <https://www.dazeddigital.com/music/article/48794/1/100-gecs-laura-les-dylan-brady-minecraft-charli-xcx> [Last Accessed September 23 2020].

<sup>165</sup> Paxton Haven, ‘Virtual Music Festivals and the Re-evaluation of Connection in a Post Covid-19 Live Music Marketplace’, *Flow Journal*, July 6 2020.

<sup>166</sup> James Rendell (forthcoming). ‘Staying In, Rocking Out: Online Live Music Portal Shows During the 2020 Coronavirus Pandemic’. *Convergence: The International Journal of Research into New Media Technologies*. pp:1-30.

<sup>167</sup> See <https://openpit.net>

<sup>168</sup> Paxton Haven, ‘Virtual Music Festivals and the Re-evaluation of Connection in a Post Covid-19 Live Music Marketplace’, *Flow Journal*, July 6 2020.

In a COVID music market where virtual reproductions of connection are the only remaining response to live music experiences, Open Pit shifts the exchange value of this affect to present both a critique of an [an] alternative to the profit-based structures and systems of promotions that were integral to the inflated pre-COVID music festival economy. Open Pit's events, therefore, operationalize dance music's histories of co-productions of space and sound to reflect and address contemporary global precarities.

Regarding the likely importance of virtual festivals at least in the short term, Open Pit's website, is an interesting starting point for how the Welsh festival economy may begin to reconsider these future potentials. However, as indicated in a new research project entitled 'Quarantine Concerts' (led by the University of Oslo), we also need to closely consider factors such as how audiences can still 'connect', in addition to the emotional and social impacts of virtual concerts as they are developing.<sup>169</sup>

#### *Live Music and Music Ecology*

As opposed to considering potential solutions, Messick (2020) focuses purely on the impact of Covid-19 on live music, with a particular emphasis on heavy metal bands' capacity to tour. Messick draws on interviews with musicians, band managers, booking agents, record label employees and concert promoters, cross-referencing his data with government documentation and media sources from Europe and the US. After outlining a brief background to the pandemic, including its emotional and financial consequences for music industry stakeholders, the article turns specifically to music, noting how the "National Independent Venue Association concluded that as many as 90% of music venues in the United States would permanently close without substantial federal funding beyond the measures that were

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<sup>169</sup> University of Oslo Centre for Interdisciplinary Studies in Rhythm, Time and Motion. 'Quarantine Concerts'. Available at: <https://www.uio.no/ritmo/english/projects/entrainment-social-bonding-pleasure/quarantine-concerts/> [Last Accessed September 23 2020].

already in place”.<sup>170</sup> This of course is a pertinent factor in Wales, with the Millennium Centre for example (in congruence with all music venues in Wales), closing its doors to the public until at least January 2021 due to the coronavirus pandemic.<sup>171</sup> Reasons given for the plight of live music venues in the essay are in congruence with what has already been noted earlier, with factors such as enforced venue closures and associated lack of audiences being key, as are the understandable ‘confidence’ issues for both the general public and the venues themselves to open/re-enter. The article, which also discusses how ‘partial opening’ (with social distancing) is not a financial viability for the majority of venues, proceeds to note the following six areas of the live music industry as being ‘hurt’:

- 1) the arenas and stadiums who employ office staff, security, technical, and many more...all the way through to concessions, 2) the trucking, shipping, and logistics required to move equipment around daily, 3) the travel and lodging industries, which are deeply intertwined with live events. Crews of people are driven around on tour buses, fly major airlines daily and stay in hotels each night in-between, 4) the production vendors who supply all of the equipment to make these events happen, 5) the artists, speakers, hosts, and all of the on-stage talent, as well as the promoters, event organizers, and their logistics teams, and 6) those that design the shows themselves — individuals, studios, agencies and more.<sup>172</sup>

Messick’s essay eventually turns to the impact of Covid-19 on ‘working’ (i.e. not household names) touring musicians and venues, many of who had to rely on

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<sup>170</sup> Kyle Messick. ‘Music Industry in Crisis: The Impact of a Novel Coronavirus on Touring Metal Bands, Promoters and Venues’. *OSF Preprints*. Available at: <https://osf.io/96ptk/> [Last Accessed September 23 2020].

<sup>171</sup> Georgia Snow. ‘Coronavirus: 250 Jobs at Risk as Wales Millennium Centre Confirms 2021 Reopening’. *The Stage*, June 12 2020. Available at: <https://www.thestage.co.uk/news/coronavirus-250-jobs-at-risk-as-wales-millennium-centre-confirms-2021-reopening> [Last Accessed September 23 2020].

<sup>172</sup> Kyle Messick. ‘Music Industry in Crisis: The Impact of a Novel Coronavirus on Touring Metal Bands, Promoters and Venues’. *OSF Preprints*, p. 4.

donations via ‘Go Fund Me’ pages to assist their survival in the wake of the pandemic (the article gives examples of both musicians and venues). In congruence to the statistic outlined earlier by the Music Managers Forum, who estimated a projected loss of £74.1 million over a six-month period, Messick’s essay describes the plight of a number of his interviewees, who discuss tours not only cancelled well before their due start date, but also those cancelled *just before* or *during*. As travel expenses in these categories were not reimbursable, they were noted as being hit particularly hard. Although small, a number of the respondents to the Forté Project survey fell into this category.

All of the factors outlined by Messick are a useful snapshot to help us appreciate the depth of the stakeholders impacted by the closure of music venues, but his essay does not take into account those impacted in the grassroots music industry, which Adam Behr addresses when urging government not to forget these important infrastructures,<sup>173</sup> noting a 2016 quote by Sir Paul McCartney.<sup>174</sup>

Artists need places to start out, develop and work on their craft and small venues have been the cornerstone for this.

While welcoming the aforementioned £1.57 billion Cultural Recovery Fund for the creative industries, Behr rightly asserts that the impact of this fund on grassroots music venues is still not confirmed, continuing to suggest that a “key feature of the relationship between the grassroots clubs, the concert halls and the arenas is interdependence—an ecology, where diversity of venues, as well as music styles, provides not only a pathway for musical careers

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<sup>173</sup> Adam Behr, ‘Arts Rescue Package: Don’t Forget Small Venues – They’re Where Big Stars Learned the Trade’. *The Conversation*, July 7 2020. Available at: [https://theconversation.com/arts-rescue-package-dont-forget-small-venues-theyre-where-big-stars-learned-their-trade-142096?utm\\_source=facebook&utm\\_medium=bylinefacebookbutton](https://theconversation.com/arts-rescue-package-dont-forget-small-venues-theyre-where-big-stars-learned-their-trade-142096?utm_source=facebook&utm_medium=bylinefacebookbutton) [Last Accessed September 23 2020].

<sup>174</sup> Anita Awbi. ‘Paul McCartney Throws Weight Behind Grassroots Venues’. *PRS for Music*, October 19 2016. Available at: <https://www.prsformusic.com/m-magazine/news/sir-paul-mccartney-throws-weight-behind-grassroots-venues/> [Last Accessed September 23 2020].

but a cultural system where the whole is greater than the sum of the parts”.<sup>175</sup> Behr’s assertion in *The Conversation* resonates with his own 2016 work with Matt Brennan, Emma Webster, Martin Cloonan and Simon Frith on ecological approaches to live concert performance,<sup>176</sup> but also the 2019 Sound Diplomacy report on the music industries in Cardiff, which considered factors such as music licencing, the development of St. David’ Hall (as a revitalised concert hall for Wales), in addition to a masterplan for the Castle Quarter area “which highlights its unique position within Cardiff’s music scene”.<sup>177</sup>

This consideration of live music ecology is also engrained in a current project that Behr is involved in, which involves Newcastle University, Birmingham City University and Aston University. The project, funded by The Creative Industries Policy and Evidence Centre (PAC) (Led by Nesta and the Arts and Humanities Research Council), investigates ways in which the live music sector in Birmingham is responding to Brexit and more recently Covid-19. It has a number of outputs which would benefit the music industries in Wales—namely a searchable venue database and interactive map, which outlines the ‘ecological’ venue infrastructures of the city, facilitating easy identification of venue types such as theatres/arts venues, pub/bar/small venue, mid-sized venue, large venue, hotel/restaurant and church/social club.<sup>178</sup> Such a map would facilitate not only a useful resource for local musicians and national/international promoters, but also as a starting point to consider factors such as how these venues can work together and potentially be prioritised for financial support in post Covid-19 times. The project team inform me that they have created the necessary programming code to create similar maps in other cities, which depending on the availability and progress of the Welsh Government’s recent venue mapping activity, would

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<sup>175</sup> Adam Behr, ‘Arts Rescue Package: Don’t Forget Small Venues – They’re Where Big Stars Learned the Trade’.

<sup>176</sup> Adam Behr et. al. ‘Live Concert Performance: An Ecological Approach’, *Rock Music Studies*, 3/1, pp. 5-23.

<sup>177</sup> Sound Diplomacy (2019), ‘Cardiff: Music Ecosystem Study and Strategic Recommendations’.

<sup>178</sup> See <https://livemusicresearch.online/blmp/>

be a prudent initiative for Wales.<sup>179</sup> The Behr et al. project also includes a blog,<sup>180</sup> which gives early insights into the development of more substantive piece of research which investigates how shifts in the economies of the global music industry impact at a local level, with the overall intension of the project being to inform policy makers, music industry stakeholders and the general public of Birmingham, on best practice.<sup>181</sup> When discussing this research at a recent online International Association of Popular Music Conference,<sup>182</sup> Behr discussed how musical ecologies are not only important at local city level, but also regional, national and international. Placing this context within Wales in a post Covid-19 world, it places emphasis on the ways in which live music policies for Cardiff council resonates with that of the Welsh and UK Government for example, with all parties needing to work together to improve post-covid music industry infrastructures. At the same conference as Behr, Sam Murray discussed the more specific emergence of Wales' capacity to have devolved cultural policy after the formation of the National Assembly in 1999, verifying how it was not possible until 2011 for Wales to introduce its own primary cultural legislation "because [previous] legislation had to go through Westminster".<sup>183</sup> Murray then focuses on how Senedd Cymru was now "trying to explore and recognise the developing potential for Wales as a nation to become a test bed of innovative cultural policy", with the Culture Welsh Language and Communications Committee enquiry into live music the subject of his case study. When discussing the enquiry, he proceeds to outline what he considers to be a 'disconnect' between the Welsh music industry and Arts Council Wales funding, in terms of "understanding what each other wants—needs—[capacity for] collaboration [and] how

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<sup>179</sup> For details of this, see 'The Birmingham Live Music Project Map'. Available at: <https://www.popmusicresearch.org/post/blmp-map/> [Last Accessed September 23 2020].

<sup>180</sup> See <https://livemusicresearch.org/category/blmp/>

<sup>181</sup> The Birmingham Live Music Project, 'Project Overview, Publications and Events'. Available at: <https://livemusicresearch.org/birmingham-live-music-project/blmp-project-overview-publications-and-events/> [Last Accessed September 23 2020].

<sup>182</sup> See <https://london-calling-iaspm2020.com/birmingham-and-the-international-business-of-live-music-a-globalised-local-perspective/>

<sup>183</sup> See <https://london-calling-iaspm2020.com/sam-murray-middlesex-university-uk/>

funding can be used effectively”.<sup>184</sup> While understanding how the funding application processes needs to be made manifestly more transparent to the music industries (a factor also highlighted in the Forté Project survey),<sup>185</sup> he also recognises the importance of Arts Council Wales “protecting public funding from misuse”, in addition to ensuring it is targeted properly. When turning more specifically to live music ecologies, Murray believed Welsh Government were currently underappreciating the reality of grassroots live music venues being cultural hubs for live music communities, in the same way as establishments such as St. David’s Hall are for classical music. Murray then notes the importance of Welsh Government working with local authorities to ensure that musical communities have the opportunities to access these cultural spaces, by closely considering how business rates and licencing are implemented appropriately across Wales, in a way that facilitates live music venues to prosper, without licencing being prohibitive. In order for a successful live music ecology to be built, in congruence with Mark Davyd’s point in chapter 1, Murray is clear that future music legislation needs to be built via collaboration (for example via music boards), noting ideas such as rate relief for venues if they adhere to particular environmental, social or cultural targets.

On the boundaries of ‘academic’ and ‘industry’ research, is a recent report by Sound Diplomacy, who analysed Cardiff’s music ecosystem. The Sound Diplomacy report rightly points out the importance of music as not only an artifact of aesthetic pleasure, but also as a unifying force that has the capacity to bring communities together (be it by attending live music events, instrumental lessons, playing in bands, etc) and facilitate our local and national recuperation. Amongst other things, it outlines the need for governments to think about music

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<sup>184</sup> Ibid.

<sup>185</sup> For example, PhD research by Luke Thomas also reveals that when asked how many music industry creatives had heard of the Music Industries Development Fund, 55 (27.92%) said ‘yes’, and 142 (72.08%) said ‘no’. See Luke Thomas (Forthcoming). *Towards a Ladder of Popular Music Support in Wales: The Musicians’ Experience*. University of South Wales PhD Thesis.



and culture differently, to consider “what we have done before, what has worked and what has not and how – with no additional resources – we can create a better music and cultural ecosystem that works for all of us”.<sup>186</sup> The report outlines what it describes as ‘the great paradox’—that despite governments being aware of the social, cultural and economic benefits of music (and other creative industries), they ignore the economic factors needed to ensure they remain ubiquitous, verifying how when we listen to music, we are rarely aware of the creative backstory of its production—from instrument manufacturing, to learning an instrument, to rehearsal, to songwriting, production, recording, , promotion and of course performing. This list of course does not include ancillary roles such as, stage production, sound engineering, tour management, etc—all of which require expertise and often financial incentives and support. The Sound Diplomacy report considers unaffordable housing in cities as being one of the factors that fuels the ‘great paradox’, with cities such as Dublin and Austin Texas, noted as examples of places which use music to ‘sell’ their city—attracting talent from other industries and creating jobs, while driving up rent and cost of living costs. This phenomenon can of course make housing and venue rates expensive, which as discussed elsewhere in this report is a major factor in grassroots venues struggling to survive in ‘normal’ times. Expensive housing and business rates also bring with it associated racism and classism factors, which have been highlighted to a greater extent during the pandemic via the ‘Black Lives Matter’ movement. When considering these issues, the report authors give one indicative example of how it may be possible to at least begin dealing with these problems.

Amazon [who are noted as building the business on selling cultural products—including music], for example, received \$129 million in tax rebates in the US and €294m (\$310m USD) in Europe in 2019. Reimagine the US rebate split into \$100,000

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<sup>186</sup> Sound Diplomacy (2020). *Music Cities Resilience Handbook. Sound Diplomacy*. Available at: <https://www.sounddiplomacy.com/better-music-cities> [Last Accessed September 23 2020].

disbursements, available to any municipality, for example, to invest in music, arts and culture locally. Alternatively, what if Amazon had to dedicate 10% – \$12.9 million – of their tax rebates to arts, music and culture.<sup>187</sup>

After outlining the traits of an ideal ‘music city’ (a process which Cardiff has already commenced), the report verifies the importance of dialogue, between local governments, musicians, venues and ‘other creatives—which is now taking place within Creative Wales. Although the membership of the ‘music industry taskforce’ has not been made public, conversations with their Sector Development Manager for Music, revealed Creative Wales have now allocated a team of three with responsibility for the music industries, who work with a number of industry advisors, ranging from managers of Welsh venues such as Le Pub, Clwb Ifor Bach and The Moon, to Welsh Festivals such as Greenman and studios such as Musicbox, to the Musicians’ Union. Returning to Sound Diplomacy’s ‘Better Cities’ report, it also highlights the need for society to respect and most importantly, pay for music, “be it a concert ticket, a live stream or a street performer”.<sup>188</sup> In terms of how music can engage with our local and national ‘recuperation’, Sound Diplomacy outline a nine point plan, which can be summarized as follows

1. Put artists to work: Incentivize creation from crisis by commissioning new work and encouraging venues to work with local emerging talent.
2. Convert creativity into community investment vehicles, via ensuring some financial support includes a stipulation to generate new material and that the funder receives a small percentage of any future royalties (1%) which can be subsequently be fed back into future local/grassroots funding.
3. Create a city music registry which has the capacity to be used in TV/Radio content

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<sup>187</sup> Ibid.

<sup>188</sup> Ibid.

(including advertisements), enabling the community to reinvest in itself and artists to be paid standard industry rates.

4. Start a cultural infrastructure plan/map. Welsh government have already started developing a map of grassroots venues, but it could be developed further in a similar fashion to that outlined in the Birmingham City Map discussed above. This map has the potential to be used for identifying issues related to factors such as transport infrastructures, policing and developing strategic partnerships. It could also be used as a means of driving tourism.

5. Create emergency preparedness plans in order to circumnavigate future crisis, in addition to ensuring all creative activity is as eco-friendly as possible.

6. Ensure music, arts and culture language is included in policy frameworks by ensuring the governing bodies of cities have a clear understanding of what a ‘music ecosystem’ is and how it relates to “city governance and basic rules of engagement [for example equality, diversity and inclusion].”<sup>189</sup>

7. Government and funders commit to genre agnosticism by communicating clearly and equitably what range of music is available in a city.

8. Plan and develop a night-time economy policy.

9. Set-up city-wide artist compensation policies, music liaison services and fair play schemes which ensure that artists are remunerated for their work.

Many of these issues resonate strongly in Wales and will be discussed further in the final section of this report.

### *General Music Making, City Sounds and Mental Health*

In terms of more general ‘music making’, the Institute of Empirical Aesthetics (positioned in Frankfurt and Aarhus Universities) have developed a ‘Musicovid’ project—a global and

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<sup>189</sup> Ibid.

interdisciplinary network of researchers and musicians focused on facilitating and supporting worldwide research on the role of music during the pandemic.<sup>190</sup> With an aim of facilitating knowledge sharing, grant funding and interdisciplinary research opportunities, (across research disciplines and physical distances), the research grouping (who had an initial collaborative gathering on May 19<sup>th</sup>) engage with subject areas such as ‘quarantine concerts’, music and mental health (including music therapy), streaming concerts, the impacts of Covid-19 on creativity and city sound mapping. Although dealing with the impact of Covid-19 on the music industries is included, the network’s principal aim is to consider its effect on society’s capacity to cope both individually and collectively, in terms of “anxiety, boredom, loneliness, stress, and uncertainty about the future”, by investigating, documenting and understanding the “multitude of ways in which music is used, experienced and discussed”.<sup>191</sup> Most importantly, although understanding these factors presently is obviously deemed important, the network also aims to provide the necessary foundations for future societies, should a similar situation arise,<sup>192</sup> a factor which resonates with Wales’ *Well-Being of Future Generations* Act of 2015.

Other projects showcased within the ‘Musicovid’ network include a series of podcasts produced by the Kennedy Centre on ‘music and the mind in times of Covid-19’, focusing on

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<sup>190</sup> See <https://www.aesthetics.mpg.de/forschung/abteilung-musik/musicovid-an-international-research-network.html>

<sup>191</sup> <https://www.aesthetics.mpg.de/en/research/department-of-music/music-in-times-of-covid-19.html>

<sup>192</sup> The research questions of the research grouping are as follows, many of which can only be undertaken by interdisciplinary groupings. Oddly, the ways in which governments have dealt with the pandemic is not included:

- How did listening and music making behaviour change during the COVID-19 pandemic?
- How do people use music as a means to cope with the situation?
- How do organizers of live music events (concert halls, festival managers etc.) respond to the situation?
- How do musicians respond creatively and practically to the situation?
- How can we simulate liveness in a time with no live music performances?
- Can participatory music making from a distance be used as a remedy for spatial distancing?
- How could we establish a typology of corona songs (in terms of content, approach, mood, instrumentation, newly composed vs. cover songs)?
- Which pieces do people pick as repertoire for virtual choirs or ensembles or for balcony singing?
- How has music been used during previous crises, and what implications may this have for the ongoing COVID-19 pandemic?

subject matters such as ‘music, loneliness and isolation’<sup>193</sup> and ‘using music for health and well-being during covid’.<sup>194</sup> All of the podcasts feature vocalist Renee Fleming in discussion with “scientists and practitioners working at the intersection of music, neuroscience, and healthcare”, with an ultimate aim of examining the need of societies to create, experience and benefit from the arts.<sup>195</sup> Amongst other things, these podcasts remind us how loneliness has been exacerbated by the pandemic, somewhat highlighting its negative consequences on health.

As a final example of research related to the health benefits of engaging in music, the Centre for Psychological Research at Keele University are currently conducting a project which attempts to understand how different types of music can benefit us personally. Based on the popular BBC radio programme Desert Island Discs,<sup>196</sup> the initiative verifies how we often turn to music for “solace, comfort and reminiscence in times of crisis, “remembering past memories from our lives [outlined as a good way of] orienting ourselves both backwards and forwards, helping us plan and think about the future”.<sup>197</sup> In what is essentially an online survey that can be implemented in ‘short bursts’ over a ten day period, participants are asked to reflect on eight pieces of music as well as a book and a luxury, which are important to them, considering what they mean both to their past lives and futures, attempting to consider what music can mean to us in times of crisis. Although the research is not finished as of yet, the project lead outlined how survey respondents have highlighted the importance of music in the portrayal and construction of identity and most importantly, its capacity to facilitate us to “transcend the here and now”.<sup>198</sup>

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<sup>193</sup> See [https://youtu.be/FND\\_IQTjGQM](https://youtu.be/FND_IQTjGQM) Also see Dr. Mark Thorley’s presentation on ‘remote working’ for the ‘Music Production and Creative Technology’ network. See <https://mupact.com/seminar-program-may-jul-2020/remotivity-working-on-music-at-the-end-of-some-wire/>

<sup>194</sup> See [https://youtu.be/zQ\\_Dc6FgGSw](https://youtu.be/zQ_Dc6FgGSw)

<sup>195</sup> The Kennedy Centre. ‘Music and the Mind Live with Renee Fleming’. Available at: <https://www.kennedy-center.org/whats-on/festivals-series/sound-health/music-and-the-mind/> [Last Accessed September 23 2020].

<sup>196</sup> See <https://www.bbc.co.uk/programmes/articles/5qhJd1byxhTBYbSCFmw580y/desert-island-discs-podcasts>

<sup>197</sup> See <http://instrumentaljourneys.com/diy-desert-island-discs>

<sup>198</sup> Alexander Lamont in email conversation with Paul Carr, July 27<sup>th</sup>, 2020.

As indicated, the network showcases a number of projects which are currently taking place around the world, one of which is a project conducted by the University of Aberdeen, which “aims to capture sonic environments which have changed as a result of governments’ actions [...] to curb the spread of the virus”.<sup>199</sup> Containing high quality ‘pre and post lockdown sounds’, the project, which is implemented on Google Maps, includes examples such as the ‘Belper Moo’ (named after a town in Derbyshire who ‘moo’ every evening out of their home windows to relieve boredom),<sup>200</sup> to numerous examples of the general public across the UK clapping front line NHS workers, to Zoom based church services, to sounds of now ‘quiet towns and cities’, that were historically very noisy. The examples outside of the UK include samples of the reduced noise levels in places such as 30<sup>th</sup> Street Station in Philadelphia (formally the 11<sup>th</sup> busiest station in the US) and Barcelona Airport (which was near silent). Although Aberdeen University don’t document what they intend to do with these sounds, they display the unique way that covid-19 has impacted the soundscapes of the world, and are a useful resource for future generations to understand how the local connects with the global, in addition to what government policy can ‘sound’ like.<sup>201</sup>

### *Performing Music and Government Policy*

Choral singing, one of the activities considered to have proven health benefits for participants in a covid free world, was the subject of another project highlighted in the ‘Musicovid’ network—a webinar entitled ‘Covid-19 and the Future of Choral Singing’.<sup>202</sup> The online event, organised by Gondwana Choir, considered how choral singing can be safely reintroduced back into Australian society, with the expert panel including academics, medics,

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<sup>199</sup> See

<https://earth.google.com/web/data=Mj8KPQo7CiExN0MwN3o5Y1JIOV8ycjRXOE5lYmlYSkt0cDVFMHBCcl8SFgoUMENENTc3RjdDQTEyNEM3QzE4NzU>

<sup>200</sup> BBC News. ‘Belper Mo Relieves Lockdown Misery’. *BBC News*, April 1 2020. Available at: <https://www.bbc.co.uk/news/uk-england-derbyshire-52252003> [Last Accessed September 23 2020].

<sup>201</sup> Although not taking place until December 16<sup>th</sup>, an online conference has also been organised on a similar subject matter by Università degli Studi di Firenze (in Italy). See <https://soundsofthepandemic.wordpress.com>

<sup>202</sup> See <https://www.youtube.com/watch?v=LZss6EbVzTo>

choir leaders and musical directors, who overviewed some of the science behind government decisions, which in many parts of the world have outlawed singing in public spaces. The webinar, which attracted over 1000 participants, also gave the choir community the opportunity to ask questions such as the rationale behind social distancing rules for choirs; the differences between school age and adult choirs returning; safety measures for opening residential camps; recommended durations of future get togethers; choir stage positioning and the impact of air-conditioning—all issues that are relevant in Wales.

It is important to note that discussions concerning the impacts of singing and indeed the blowing of brass/woodwind instruments in social spaces is taking place on an ongoing basis across the UK, off the back of concerning reports of the virus spreading via church singing in Korea in February<sup>203</sup> and in March in Washington State, which heralded reports of 52 out of 61 people attending becoming ill with the virus, with two sadly passing away. An article in the Guardian in July outlined how “professional [only] rehearsals and outdoor performances [were at that point] allowed under strictly limited circumstances in England—somewhat lagging behind other parts of Europe”—a factor which is reflected in the next chapter. However, at the time the article was published (July 2020), English guidelines explicitly forbid amateurs from group singing in front of audiences, with the governments in Scotland and Wales noted as not having published their rules for resuming the performing arts.<sup>204</sup> As of October 2020, there was no clear firm evidence on how either the ‘droplets’ or aerosol components of Covid-19 were propagated by either public singing or in particular wind/brass instruments, with the Musicians’ Union response to the UK

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<sup>203</sup> The Guardian. ‘South Korean City on High Alert as Coronavirus Cases Soar at ‘Cult’ Church’. The Guardian, February 20 2020. Available at: <https://www.theguardian.com/world/2020/feb/20/south-korean-city-daegu-lockdown-coronavirus-outbreak-cases-soar-at-church-cult-cluster> [Last Accessed September 23 2020].

<sup>204</sup> Charlotte Higgins. ‘Sing Into the Funnel Please: Inside the Covid-19 Lab Hoping to Declare Singing Safe’. *The Guardian*, July 22 2020. Available at: [https://www.theguardian.com/music/2020/jul/22/sing-funnel-covid-19-lab-hoping-declare-singing-safe?CMP=fb\\_gu&utm\\_medium=Social&utm\\_source=Facebook#Echobox=1595414736](https://www.theguardian.com/music/2020/jul/22/sing-funnel-covid-19-lab-hoping-declare-singing-safe?CMP=fb_gu&utm_medium=Social&utm_source=Facebook#Echobox=1595414736) [Last Accessed September 23 2020]. Scotland has since published their guidelines.

Government's guidelines on playing wind and brass instruments at the time (published on July 10<sup>th</sup>), confirming how such instruments don't project air—they project sound, quoting Sir Simon Rattle's now well-known assertion that "you cannot blow out a candle with a trombone".<sup>205</sup>

Although this is not the place to outline detailed research regarding the safety measures required when performing onstage vocally and/or instrumentally, in congruence with Sir Simon Rattle's point above, in June, research in Germany also cast doubt on the risk that singing presented in terms of the spread of Covid-19.<sup>206</sup> Speaking specifically about congregational singing in churches, the article suggests that with "adequate risk assessment and social distancing, singing could be restored in some contexts as part of church life in the UK".<sup>207</sup> As from August 14<sup>th</sup>, the UK Government guidelines for England, reconsidered their stance on prohibiting amateurs from group singing in front of audiences, now allowing non-professional small vocal groups to sing as part of a church service, providing appropriate social distancing and hygiene measures are employed.<sup>208</sup> As of October 9<sup>th</sup> 2020, Welsh Government guidelines states the following, initially indicating that singing is prohibited in churches.

[...]activities such as singing, chanting, shouting should be specifically avoided. This is because there is a possible additional risk of infection in environments where individuals are singing or chanting as a group, and this applies even if social

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<sup>205</sup> Musicians' Union. 'MU Members Response to the Guidance on Playing Wind and Brass Instruments', July 10 2020. Available at: <https://www.musiciansunion.org.uk/Home/News/2020/Jul/Richard-Steggall-on-Playing-Wind-Brass-instruments?fbclid=IwAR2VsWi8Rw0S7H5G7mduAzPqCgH8GnegA60XZKkJxO1SYBHjcd8yd2Hicaw> [Last Accessed September 23 2020].

<sup>206</sup> Pat Ashworth. Singing Might Not Be So Great A Risk, After All. The Church Times, June 4 2020. Available at: <https://www.churchtimes.co.uk/articles/2020/5-june/news/uk/singing-might-not-be-so-great-a-risk-after-all> [Last Accessed September 23 2020].

<sup>207</sup> Ibid.

<sup>208</sup> Joe Siedlecka. 'Government Relaxes Covid Rules on Singing in Church'. Independent Catholic News, August 17 2020. Available at: <https://www.indcatholicnews.com/news/40254> [Last Accessed September 23 2020].



distancing is being observed or face coverings are used. This applies equally for indoor and outdoor worship and ceremonies.<sup>209</sup>

The guidelines then confusingly continue to confirm how singing by one individual *is permitted*, when it is considered “an essential part of the worship,” with plexi-glass screens and appropriate physical distancing also recommended to protect others. The use of wind instruments is currently not allowed in Welsh churches.

Returning to performing music more generally, as of October 30<sup>th</sup>, section 4.7 of the updated UK/English guidelines for the Performing Arts, currently indicate that venues will “usually” have to consider the following for music.

- Observing social distancing at all times when playing.
- In the professional environment and when social distancing is not possible, to employ ‘fixed teams’ of personnel for performances when possible. It is recognised this is not possible in non-professional or indeed in many professional environments (for example in the case of freelance musicians).
- Position performers side to side or back to back, avoiding performers facing each other where possible.
- That performances should ideally take place outdoors.
- When playing indoors, limit ensemble size to accommodate better ventilation and social distancing.
- To consider regular testing, especially for performers who play with more than one ensemble.
- Consider using booths or barriers between performers.

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<sup>209</sup> Welsh Government. ‘Guidance on Reopening Places of Worship: Coronavirus. First Published June 23 2020. Available at: <https://gov.wales/guidance-reopening-places-worship-coronavirus-html#section-44811> [Last Accessed October 30<sup>th</sup> 2020].

The document, which consists of guidance for the performing arts more generally, also has advice for sound and lighting, orchestra pits and band areas, including additional advice such as

- Organise suitable repertoire and group/ensemble size to facilitate social distancing, reducing any time this is not possible to a minimum.
- To consider the use of technological solutions to assist safety.
- Use tape or paint on stage to assist social distancing.
- Screening audiences prior to entry, having clear guidelines for when identifying a ‘Covid-19’ positive individual.<sup>210</sup>

A number of music industry bodies responded to the updated guidelines, with the Association of British Choral Directors and Brass Band England welcoming the fact that non-professionals can now engage in performance activities in England, based on new Public Health England research.<sup>211</sup> The Musicians’ Union were also keen to point out that these changes were implemented as a direct result of lobbying, which resulted in the Department of Culture Media and Sport commissioning “further scientific studies to be carried out to develop evidence on these activities, which has now been approved by SAGE [the Scientific Advisory Group for Emergencies] and has enabled the government to revise their guidelines”.<sup>212</sup> As of early September, Wales was the only home nation not to have published

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<sup>210</sup> UK Government. ‘Working Safely During Coronavirus (Performing Arts)’. These guidelines were updated on August 13<sup>th</sup>.

<sup>211</sup> See The Association of British Choral Directors. ‘Revised Guidelines Allow Non-Professional Singing Again’. *The Association of British Choral Directors*, August 14 2020. Available at: [https://www.abcd.org.uk/news/2020/08/Revised\\_guidelines\\_allow\\_nonprofessional\\_singing\\_again](https://www.abcd.org.uk/news/2020/08/Revised_guidelines_allow_nonprofessional_singing_again) [Last Accessed September 23 2020] and Brass Bands England. ‘BBE Offers Sector Support Advice on the Latest Covid-19 Pandemic Guidelines From DCMS-Effective From 14 August 2020’. *Brass Bands England*, August 28 2020. Available at: <https://www.bbe.org.uk/news/28082020-1659/bbe-offers-sector-support-advice-the-latest-covid-19-pandemic-guidelines-dcms>— [Last Accessed September 23 2020].

<sup>212</sup> The Musicians’ Union. ‘Restriction Around Singing, Wind and Brass Instruments Relaxed in England’. *The Musicians’ Union*, August 14 2020. Available at: <https://www.musiciansunion.org.uk/Home/News/2020/Aug/Restrictions-Around-Singing-Wind-and-Brass-Instrum> [Last Accessed September 23 2020].

its own specific information for the performing arts, although as outlined towards the end of Chapter 2, guidance was published on September 15<sup>th</sup>.<sup>213</sup>

### *Journals, Symposia and Thought Pieces*

A small number of journals have released a ‘call for papers’ on the relationships between music and the pandemic, with one such example being *The Journal of Health and Well-Being*, who are currently putting together a series of articles together under the collective heading of ‘The Role of Music During Covid-19: Short-Term Challenges Through Technology, Wellbeing, Industry and Education’.<sup>214</sup> Although the collection is not published as of yet, a series of short abstracts indicate the themes covered range from considering the health and well-being of musicians and students; music as a mood regulator; sustaining inter-cultural musical exchanges and how the brass band world has adapted and the impacts of lockdown on amateur music groups.<sup>215</sup> Although the latter is the only paper which directly relates to the impact of Covid-19 on the music industries, the other subject areas are all important factors for government to consider as society learns to come to terms with a post-covid world. Another journal which responded rapidly to the emergence of Covid-19 is the open access platform *Frontiers*, whose call was entitled ‘Social Convergence in Times of Spatial Distancing: The Role of Music During the Covid-19 Pandemic’.<sup>216</sup> The Journal outlines that the various creative ways both professional and amateur musicians initially responded to the pandemic, “bore witness to an underlying conviction about music’s ability to create and maintain social bonds, to show gratitude, to promote public health, and to

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<sup>213</sup> Welsh Government. ‘Rehearsing, Performing and Taking Part in the Performing Arts: Guidance for a Phased Return’.

<sup>214</sup> See <https://sites.manchester.ac.uk/alc-grad-school/2020/06/24/the-role-of-music-during-covid-19-short-term-challenges-through-technology-wellbeing-industry-education/>

<sup>215</sup> The Journal of Music Health and Wellbeing. ‘New Research’. Available at: <https://www.musichealthandwellbeing.co.uk/new-research> [Last Accessed September 23 2020].

<sup>216</sup> Frontiers. ‘Social Convergence in Times of Spatial Distancing: The Role of Music During the Covid-19 Pandemic’. *Frontiers*. Available at: <https://www.frontiersin.org/research-topics/14089/social-convergence-in-times-of-spatial-distancing-the-role-of-music-during-the-covid-19-pandemic#overview> [Last Accessed September 23 2020].

escape from anxiety, boredom, loneliness, stress, and uncertainty about the future”.<sup>217</sup>

However, although many of the responses communities across the world displayed commonalities, music is seen to be “conceptualized and practiced very differently across cultures”,<sup>218</sup> and it is this psychological-cultural relationship the journal is intending to engage with.

In addition to academic journals, there have also been a small number of symposia instigated in the wake of the pandemic, such as an event organised by Royal Holloway and Goldsmiths, in conjunction with the Institute of Musical Research. Entitled ‘Orchestrating Isolation: Musical Interventions and Inequality in the Covid-19 Fallout’, the event asked a series of important questions such as how Covid-19 has changed musical practices for performers and industry, including digital equalities, cultural differences for audiences, industry hierarchies and touring networks.<sup>219</sup> Additionally, the ‘call for papers’ for a forthcoming event organised by the University of Lincoln in conjunction with the British Forum of Ethnomusicology (entitled ‘Ethnomusicology and Music Enterprise in Catastrophic Times’) notes how similar infrastructural shifts within the music industries have in fact occurred before in the Great Depression for example, where “radio broadcasting became ubiquitous and changed the public’s listening habits, promoting new recording techniques that consolidated the popularity of specific genres such as ‘crooning’”.<sup>220</sup> In more recent times, the austerity measures resulting after the 2008 financial crisis led to many musicians losing income streams “as culture was drastically cut from government budgets and both

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<sup>217</sup> Ibid.

<sup>218</sup> Ibid.

<sup>219</sup> The Institute of Musical Research. ‘Orchestrating Isolation: Musical Interventions and Inequality in the Covid-19 Fallout’. June 22 2020. Available at: <http://www.the-imr.uk/orchestrating-isolation-musical-interventions-and-inequality-in-the-covid-19-fall-out> [Last Accessed September 23 2020].

<sup>220</sup> The British Forum of Ethnomusicology. ‘Ethnomusicology and Music Enterprise in. Catastrophic Times’. *The British Forum of Ethnomusicology*, November 7 2020. Available at: <https://bfe.org.uk/conf/ethnomusicology-and-music-enterprise-catastrophic-times> [Last Accessed September 23 2020].

individuals and large companies were forced to rethink their economic models”.<sup>221</sup> “What ensued was a surge of inventiveness to keep music going despite dire circumstances”.<sup>222</sup> The conference call for papers proceeds to discuss how the “current pandemic “has highlighted on a global level the fragility of social and economic systems based solely on services without any state-organised safety nets for the performing arts industries such as those found in France and Belgium”.<sup>223</sup> The pandemic is also noted as offering an opportunity for the music industries to “reassess their position in the world” via movements such as ‘Black lives Matter’.

In the academic world, it is not uncommon for the turnaround of peer reviewed publications to take more than a year from start to finish. However, due to the need for a more rapid response as government legislation progresses and the reality of the virus becomes starker, there have been some examples of what could be called ‘thought pieces’ in the academic community, which are generally shorter and more informal in nature. The research group ‘Working in Music’ are one such example of a network who have produced a series of pieces on subject matters such as women in music during Covid-19;<sup>224</sup> private sector support networks in Chile in the midst of lack of government support;<sup>225</sup> impacts of the pandemic on music research, and funding support for UK musicians.<sup>226</sup> Regarding the latter, Olivier Gable outlines how we require a more comprehensive understanding of both the unique challenges musicians and workers in the music industries face, in addition to more

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<sup>221</sup> Ibid.

<sup>222</sup> Ibid.

<sup>223</sup> Ibid.

<sup>224</sup> See Nune Nikoghosyan, ‘Women in Music During Covid-19: Viva Sanchez Reinoso, Musician’. *Working in Music*, July 13 2020. Available at:

<https://wim.hypotheses.org/1405> [Last Accessed September 23 2020] and Karmy. ‘Women in Music During Covid-19: Penny Stone, Musician’. *Working in Music*, June 22 2020. Available at:

<https://wim.hypotheses.org/1377> [Last Accessed September 23 2020].

<sup>225</sup> Eileen Karmy and Estafania Ugueta. ‘Musical Workers’ Precarity Uncovered and the Revival of Mutual Aid in Chile’. *Working in Music*, July 6 2020. Available at: <https://wim.hypotheses.org/1393> [Last Accessed September 23 2020].

<sup>226</sup> Andrew Chatora, ‘Researching Musical Work While in Lockdown’, *Working in Music*, June 1 2020. Available at: <https://wim.hypotheses.org/1319> [Last Accessed September 23 2020].

clarity how we can address them in both the short and long term.<sup>227</sup> Gable draws on her PhD research verifying the freelance nature of the music industries, with many musicians undertaking portfolio careers and often working jobs outside of their profession in order to make a living. Drawing on evidence from a DCMS committee meeting on June 9<sup>th</sup>,<sup>228</sup> Gable outlines the financial struggles that many musicians were already facing pre covid, with many respondents to a Musicians' Union Survey stating they doubted "they would be able to "stay in the industry following the crisis".<sup>229</sup> Gable's essay then proceeds to confirm many of the factors outlined earlier in this report, such as many musicians and workers in the music industry falling through the gaps of the two main UK support schemes— the Coronavirus Jobs Retention Scheme (CJRS) for employees and the Self-Employment Income Support Scheme (SEISS). Amongst the 'workers', Gable specifically mentions the small labels and management companies who "may or may not qualify for the SEISS due to their business structures",<sup>230</sup> verifying that they "could be forgiven for shying away from the loans offered to small businesses in England" (with the exception of the Small Business Grant Fund and Discretionary Local Authority Grants Fund). She also notes now the devolved nations "have opted to offer additional grants to small businesses", with Scotland creating a 'hardship fund' specifically for new self-employed workers "who couldn't meet SEISS eligibility".<sup>231</sup> While noting that the arts councils of all four home nations had set up emergency funding, most of which had now expired, they are seen to be lacking when compared to Germany's 156bn Euro fund for example, "with concerns [also noted] that the UK funding available to freelancers and creative businesses isn't flexible enough to work for all variations of business

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<sup>227</sup> Olivier Gable (2020), "'A Drop in the Ocean'? Funding and Support for UK Musicians in the Covid-19 Crisis'.

<sup>228</sup> Digital, Culture, Media and Sport Committee. 'Oral Evidence' The Impact of Covid-19 on DCMS Sectors: Creative Industries'. June 9 2020. Available at: <https://committees.parliament.uk/oralevidence/477/pdf/> [Last Accessed September 23 2020].

<sup>229</sup> Olivier Gable (2020), "'A Drop in the Ocean'? Funding and Support for UK Musicians in the Covid-19 Crisis'.

<sup>230</sup> Ibid.

<sup>231</sup> Ibid.

structures”.<sup>232</sup> In concluding, Gable regards the numerous private section support funds outlined earlier in this report as “testament to the persistent crisis and need for support that hasn’t been quelled through existing government funds”, although it is important to point out that “these come with their own criteria”.<sup>233</sup>

Other thought pieces include considerations of the ways in which both musicians and the general public turn to music in times of crisis, with a piece published by the World Economic Forum asserting that music making as a way of gaining control in a world where autonomy is greatly restricted. Examples of this phenomena included the residents in Italy and Wuhan ‘singing across balconies’ near the start of the crisis to You Tube Choirs. The article outlines how music has the capacity to ‘create a sense of community and belonging’, acting as “an antidote to the growing sense of alienation and isolation in society in general”.<sup>234</sup> Most importantly, the article verifies how the pandemic is not the first time this has occurred, citing the hymns Parisians sang when the cathedral at Notre Dame burnt down in 2019. Another piece by the World Economic Forum discuss more generally the impact of the pandemic on the music industries, noting how the growth in music streaming over the last six years (where it has expanded from 9% to 47% of total industry revenues) is likely to be key.<sup>235</sup> The article continues to outline how streaming and online music subscriptions have grown during the pandemic, with listening routines changing towards consumers wanting to listen to more ‘relaxing’ music.

I would like to finish this chapter by briefly discussing an interesting project currently being implemented by Dr. Ioannis Tsioulakis and Dr. Ali FitzGibbon from Queens

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<sup>232</sup> Ibid.

<sup>233</sup> Ibid.

<sup>234</sup> World Economic Forum. ‘Why Do We Turn to Music in Times of Crisis’. *World Economic Forum*, March 30 2020. Available at: <https://www.weforum.org/agenda/2020/03/coronavirus-music-covid-19-community/> [Last Accessed September 23 2020].

<sup>235</sup> World Economic Forum. ‘This is How Covid-19 is Affecting the Music Industry’. *World Economic Forum*, May 27 2020. Available at: <https://www.weforum.org/agenda/2020/05/this-is-how-covid-19-is-affecting-the-music-industry/> [Last Accessed September 23 2020].

University in Belfast. Their work, which focuses mainly on Northern Ireland and Greece, verifies how the performing arts sector (theatre and music) were already experiencing difficulties prior to the pandemic, due to “prolonged austerity”, which highlights the importance of considering both short and long term solutions (in order to ensure that “a critical workforce is not abandoned”).<sup>236</sup> They refer to their previous work on the precarious and fragile nature of Creative Industries workforces and how their research during the pandemic has displayed “not only the fragility of the lives and livelihoods of these occupations but also the failure of governments and public agencies to understand the nature of this work or the gaps in existing support systems”.<sup>237</sup> The essay then proceeds to reference some of the long standing research that considers the issues associated with the ‘freelance’ nature of the creative industries: relatively low income (when compared to their non-creative counterparts in the same industries), poor pension plans and lack of protection by employment regulations, all of which make these workers more susceptible during a pandemic. For example, musicians in both Greece and the UK not only had work cancelled during the pandemic, but were seen to have ‘poor contracts’—resulting in no “contingency mechanisms for compensation”.<sup>238</sup> As outlined earlier in the Forté Survey, interviews with stakeholders in the industry reveal “lost opportunities that for many will be career-changing: a sell-out show, a leading role, a breakthrough album, a concert tour, [all of which] may never be recovered”.<sup>239</sup> Additionally, the portfolio careers of those in the performing arts sector are regarded as ‘disappearing’, with one Greek respondent typifying the problem: “I make a living through three activities: gigging in commercial venues, private tuition, and

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<sup>236</sup> Ioannis Tsioulakis and Ali FitzGibbon, ‘Performing Artists in the Age of Covid-19: A Moment of Urgent Action and Potential Change’. *Queens Policy Engagement*, April 9 2020. Available at: <http://qppl.qub.ac.uk/performing-artists-in-the-age-of-covid-19/> [Last Accessed September 23 2020].

<sup>237</sup> Ibid.

<sup>238</sup> Ibid.

<sup>239</sup> Ibid.



busking. Now I can't do any of it!.”<sup>240</sup> Also, as indicated earlier, many of the respondents in Tsioulakis and FitzGibbon's research outline how financial models in the performing arts often leave them ineligible for government finance schemes. Although much of their research resonates strongly with what has already been documented in this report, they do highlight a particular issue that has not been mentioned—what they describe as the ‘oversupply’ of cultural work. As indicated earlier, freely available music on the internet is a welcome gesture in a time of crisis, but, as Tsioulakis and FitzGibbon point out, we need to be aware that it also somewhat condones an expectation that is pervasive when audiences engage with both social media and also in grassroots music fraternities—the expectation that music is available for free. Tsioulakis and FitzGibbon's article concludes with a series of recommendations, one of which is the importance of all citizens having access to universal basic income (UBI), with Spain being noted as the first country to roll this out.<sup>241</sup> According to the authors, “UBI is a better solution than bureaucratically complex compensation schemes with gaps that freelance performing artists fall through”.<sup>242</sup>

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<sup>240</sup> Ibid.

<sup>241</sup> Kate Ng. Coronavirus: ‘Spain to Become First Country in Europe to Roll Out Universal Basic Income’. *The Independent*, April 6 2020. Available at: <https://www.independent.co.uk/news/world/europe/coronavirus-spain-universal-basic-income-europe-a9449336.html> [Last Accessed September 23 2020].

<sup>242</sup> Ibid. Future Generations Commissioner Sophie Howe recently called for UBI for creatives in Wales. See Sophie Howe, ‘Future Generations Commissioner Calls for Universal Basic Income Pilot for Creatives’. *Future Generations Wales*, August 7 2020. Available at: <https://www.futuregenerations.wales/news/future-generations-commissioner-calls-for-a-universal-basic-income-pilot-for-creatives/> [Last Accessed October 14 2020].

## Chapter 4: What Wales Can Learn and How Does it Compare To Other Nations?

### UK Home Nations Financial Support

Having already discussed UK wide public and private body support for businesses and individuals, this chapter will consider some of the more specific schemes that Welsh Government have initiated, prior to comparing them (and the pan UK offer) to other nations around the world. When one considers the support that Welsh Government has contributed specifically toward grassroot music venues, as noted above by Mark Davyd (both when he gave evidence at the Culture, Welsh Language and Communications Committee session on June 24 2020 and when interviewed),<sup>243</sup> Wales was considered to be at the forefront of Home Nations grassroot music venue support by the Music Venue Trust, having allocated £401,551.39 on April 1<sup>st</sup>, well before the other home nations. Over three months later, Scottish Government allocated £2.2 million to grassroots music venues on July 11<sup>th</sup>,<sup>244</sup> while England assigned a near identical amount of £2.25 million, specifically for grassroot music venues on July 25<sup>th</sup>—as part of the first tranche of the UK government’s aforementioned £1.57 billion Cultural Recovery Fund (this was a ‘short term solution to save around 150 venues suffering from insolvency’).<sup>245</sup> Regarding Northern Ireland, after initially launching the ‘Coronavirus: Artist Emergency Programme’ in April, the ‘Coronavirus: Creative Support Fund’ followed, with its

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<sup>243</sup> See <http://senedd.tv/Meeting/Archive/1397f2fa-4949-4611-96fb-b9bf507ced04?autostart=True>

<sup>244</sup> Intended to stabilise “the cultural sites across Scotland that are facing an economic crisis amid the Covid-19 lockdown”, covering ‘fixed costs’ such as “rent, non-furloughed staff, servicing debts and utilities. See Scottish Music Industries Association. ‘Scottish Government Announces £2.2 Million Fund to Support Grassroot Music Venues’. *Scottish Music Industries Association*, July 11 2020. Available at: <https://www.smia.org.uk/development/coronavirus-resources/scottish-government-announces-2-2-million-fund-to-support-grassroots-music-venues/> [Last Accessed September 24 2020]. For more information on the Scottish music industry see <https://www.smia.org.uk/coronavirus/>

<sup>245</sup> UK Government. ‘Grassroots Music Venues to be Saved by Government Cash’. *UK Government*, July 25 2020. Available at: <https://www.gov.uk/government/news/grassroots-music-venues-to-be-saved-by-government-cash> [Last Accessed September 24 2020].

second strand (launched in August) aimed specifically at organisations.<sup>246</sup> It is important to point out that these schemes do not include other generic Arts Council support packages Northern Ireland, Scotland and England have introduced, which featured a range of bridging bursaries,<sup>247</sup> relief funds for performing arts venues,<sup>248</sup> individual resilience packages,<sup>249</sup> cultural recovery funds,<sup>250</sup> creative incentives,<sup>251</sup> (including those for disabled artists<sup>252</sup>) and artist support programmes,<sup>253</sup> some of which resonate with the schemes offered by Arts Council Wales outlined in earlier.

In terms of rate relief and small business grant assistance in the UK, current support mechanisms can be outlined as follows according to the Music Venue Trust,<sup>254</sup> with all home nations offering at least the potential for 100% business rate relief in addition to a small business grant, for the remainder to the current tax year.

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<sup>246</sup> See Northern Ireland Business Info. 'Coronavirus: Artists Emergency Programme', Northern Ireland Business Info, July 31 2020. Available at: <https://www.nibusinessinfo.co.uk/content/coronavirus-artists-emergency-programme> [Last Accessed September 24 2020].

<sup>247</sup> Creative Scotland. 'Bridging Bursary for the Arts and Creative Sector'. *Creative Scotland*. Available at: <https://www.creativescotland.com/funding/archive/bridging-bursary> [Last Accessed September 24 2020].

<sup>248</sup> Creative Scotland. 'Performing Arts Venues Relief Fund Opens for Submissions of Interest'. *Creative Scotland*, July 29 2020. Available at: <https://www.creativescotland.com/what-we-do/latest-news/archive/2020/07/performing-arts-venues-relief-fund-opens> [Last Accessed September 24 2020].

<sup>249</sup> Arts Council of Northern Ireland. 'Individuals Emergency Relief Programme'. *Arts Council of Northern Ireland*. Available at: <http://artscouncil-ni.org/funding/scheme/individuals-emergency-resilience-programme> [Last Accessed September 24 2020].

<sup>250</sup> Arts Council England. 'Culture Recovery Fund: Capital Kickstart Fund'. *Arts Council England*. Available at: <https://www.artscouncil.org.uk/funding> [Last Accessed September 24 2020].

<sup>251</sup> Creative Scotland. 'Open Fund: Sustaining Creative Development'. *Creative Scotland*. Available at: <https://www.creativescotland.com/funding/funding-programmes/open-fund-sustaining-creative-development> [Last Accessed September 24 2020].

<sup>252</sup> Creative Scotland. 'New Fund Guidance for the Unlimited Arts Programme'. *Creative Scotland*. Available at: <https://www.creativescotland.com/what-we-do/latest-news/archive/2020/07/unlimited> [Last Accessed September 24 2020].

<sup>253</sup> Arts Council of Northern Ireland. 'Support for the Individual Artist Programme'. *Arts Council of Northern Ireland*. Available at: <http://artscouncil-ni.org/funding/scheme/SIAP> [Last Accessed September 24 2020].

<sup>254</sup> See <http://musicvenuetrust.com/2020/03/covid-19-advice-for-venues/>

<b>Country</b>	<b>Business Rate Relief</b>	<b>Small Business Grant</b>
Wales	100% non-domestic rate relief for all retail, leisure and hospitality businesses with a rateable value of £500k or below.	25k for businesses with a rateable value of between £12,001 and £51,000.  10k for businesses with a rateable value less than £12k.
England	100% for all Grassroot Music Venues, regardless of size.	£25,000 for properties with a rateable value of between £15,000 and £51,000.  10k for businesses with a rateable value lower than £15k.
Northern Ireland	100% non-domestic rate relief for the retail, hospitality and leisure sector for 2020-21. <sup>255</sup>	£25k for properties with a rateable value of between £15k and £51k.  £10k for businesses in receipt of the Small Business Bonus Scheme.
Scotland	100% non-domestic rate relief for the retail, hospitality and leisure sector for 2020-21.	£25k for businesses with a rateable value between £18k and £51k.  £10k for businesses in receipt of the Small Business Bonus Scheme

It is important to point out however, that despite having broadly similar financial initiatives, as outlined earlier in this report, approaches supporting the return of live music across the UK are distinct, with the following table outlining the main differences, between England and Scotland (who have facilitated indoor live performances) and Northern Ireland and Wales. (who have not).

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<sup>255</sup> See <https://www.finance-ni.gov.uk/news/over-25000-businesses-benefitting-100-rate-relief-murphy>

These broad positions do not take into account the local lockdown measures that took place across the UK from late September, as it is expected at the time of writing that once these ‘fire breaker’ measures are over, the following policies will be returned to.

Wales	No indoor performances since the pandemic started.  Performances are however allowed to be broadcast without an audience in theatres, concert halls and other live music venues. <sup>256</sup>
England	Socially distanced indoor and outdoor performances allowed for professionals and semi-professionals (although their guidelines are distinct), providing social distancing and other government guidance is adhered to. <sup>257</sup>  Professional activity is currently at ‘Stage 4’ of the UK Government’s 5 stage roadmap.
Scotland	Socially distanced indoor and outdoor performances allowed, in line with government guidance. <sup>258</sup>
Northern Ireland	No indoor performances since the pandemic started.

## Support in Non-UK Nations

On an episode of the BBC’s *Front Row*, entitled ‘The Arts in Crisis’, broadcast (on June 30<sup>th</sup>) just prior to the UK government announcing their £1.57 billion Cultural Recovery Fund, the

<sup>256</sup> Welsh Government. ‘Closure of Businesses and Premises: Coronavirus (Covid-19)’. First Published March 24 2020. Available at: <https://gov.wales/coronavirus-covid-19-closure-businesses-and-premises-html> [Last Accessed September 23 2020].

<sup>257</sup> UK Government. ‘Working Safely During Coronavirus (Performing Arts)’. First Published May 11 2020. Available at: <https://www.gov.uk/guidance/working-safely-during-coronavirus-covid-19/performing-arts> [Last Accessed September 23 2020].

<sup>258</sup> Scottish Government: ‘Coronavirus (Covid-19): Guidance for the Performing Arts and Venues Sector’. Published October 9 2020. Available at: <https://www.gov.scot/publications/coronavirus-covid-19-guidance-for-the-performing-arts-and-venues-sector/pages/people-involved-in-performing-producing-designing-and-supporting-events/#Playing%20music> [Last Accessed October 22 2020].

Guardian's Charlotte Higgins outlined the problems of directly comparing how different countries fund the arts. Verifying that the ways in which the arts are funded significantly vary between nations,<sup>259</sup> she noted how the British “operate in a kind of mixed economy, somewhere between [...] North America where there is almost no arts subsidy and mainland Europe [...], where there is extremely high subsidy”.<sup>260</sup>

The result of this in a crisis like covid [in the UK] is there are neither a [...] billionaire philanthropist [...] ready to open their wallets as one hopes there are in America, nor does one have the cushion of say an 80% subsidy, that means that one is so much less exposed to not having box office income, than if one has a 20% or a 30% subsidy as in this country”.<sup>261</sup>

So although the arts in the UK could be regarded as having an ‘ideal’ mix of commercial income (where organisations need to be receptive to their audiences) and public support, it is a system which is exposed somewhat during a crisis like Covid-19, where venues can't raise their own income— how do they circumnavigate the shortfall?

A June 18<sup>th</sup> edition of The Guardian overviewed a number of covid support measures from around the world, some of which will be discussed in more detail below, with Italy noted as establishing a £220 million fund to “sustain companies and workers in the world of performing arts during the lockdown”,<sup>262</sup> with other notable examples including Germany (£900 million for theatres, museums and other organisations); New Zealand (£90 million for arts and music sectors); Canada (£300 million for culture, arts and sport), Spain (£69.3 million) and most notably France (6.3 billion Euros for small businesses more generally).

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<sup>259</sup> BBC Sounds. ‘The Arts in Crisis’. June 30 3030. Available at: <https://www.bbc.co.uk/sounds/play/m000kgjt> [Last Accessed September 24 2020].

<sup>260</sup> Ibid.

<sup>261</sup> Ibid.

<sup>262</sup> The Guardian. ‘World Spends to Prevent Culture From Economic Ruin’. *The Guardian*, June 18 2020. Available at: <https://www.theguardian.com/culture/2020/jun/18/world-spends-to-protect-culture-from-economic-ruin> [Last Accessed September 24 2020].

When examining the amounts awarded by these various countries, it is noticeable that although the article depicts the amount awarded, it is not always clear what the finance is for, which overlays another area of complexity when attempting to compare ‘like for like’.

This is an issue that is verified by Jackie Bailey (2020), when gathering government and art organisation related art/creative industry support from around the world.<sup>263</sup> Bailey’s article examines the recovery approaches, digital actions, ‘general’ support and emergency support mechanisms of 54 countries, of which she notes 19 countries having “social insurance-style support which did not specify a total figure of support for the arts”.<sup>264</sup> Of the 35 remaining countries which announced targeted arts related funding, 6 included what she describes as ‘mixed packages’ (including areas such as sports or heritage for example), which after removing them, resulted in 29 countries which had specific arts and culture based packages. Interestingly, these resulted in the aforementioned £900 million German package and the £300 million Canadian one being removed, as they contained ‘non-art’ aspects, with specific allocations noted as being difficult to decipher. When the article was published on June 30<sup>th</sup>, the author considered the following nations to be the ‘top 5 government spenders’ on ‘emergency arts funding packages’, which helps contextualise the £1.57 billion Cultural Recovery Fund the UK announced only days after Bailey’s article was published. It also of course highlights the slow speed and low priority in which the UK provided arts and cultural support to the Creative Industries sectors.

1. **Austria** (EUR 2 billion for arts and culture) (c. 8.9 million population; EUR 225 per capita)

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<sup>263</sup> Jackie Bailey. ‘Government Responses to the Impact of Covid-19 on the Arts and Creative Industries’. *PYP Group*, June 30 2020. Available at: <https://www.bypgroup.com/blog/2020/3/21/government-arts-responses-to-covid-19> [Last Accessed September 24 2020].

<sup>264</sup> Ibid.

2. **Poland** (EUR 900 million for arts and culture) (c.38 million population; EUR 24 per capita)
3. **Japan** (EUR 882.2 million, mostly for global demand creation and promotion of content) (c. 126.5 million population, EUR 7 per capita)
4. **Netherlands** (EUR 300 million for arts and culture) (c. 17.3 million population, EUR 17 per capita)
5. **USA** (EUR 282.9 million for arts and culture) (c. 328.2 million, EUR 0.86 per capita).<sup>265</sup>

In terms of approaches and in line with what has taken place in the UK, governments across the world are noted in Bailey’s report as making available to small to medium size businesses, rate and tax relief, low cost loans and grants. Additionally, as in the UK, countries are generally noted as “helping businesses to keep people employed at lower rates of pay”, with examples including France’s furlough scheme (which includes facilitating unemployment benefit for those who have been forced to work part-time); Denmark supporting both employed and self-employed workers (who have had a decrease of more than 30% of self-employed income); Cyprus supplementing cultural organisations whose income has been reduced by more than 25%, and Austria’s implementation of a 2 billion euro hardship fund, which includes support for newly self-employed artists. As the pandemic progressed, some nations such as Columbia (via their social security for ‘older artists’ scheme) and Austria (via their ‘artists social security scheme’)<sup>266</sup> are also considered to have extended their social insurance schemes to artists and freelancers, “recognising they often fall through the

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<sup>265</sup> Ibid.

<sup>266</sup> With a maximum pot of 6000 Euros per person in the first instance.



cracks of general economic measures”.<sup>267</sup> As well as “[s]ome governments [...] re-direct[ing] funding to provide individual artists with additional grant opportunities”, a variety of support mechanisms are also noted as assisting artists (including musicians) provide ‘digital content’, with “[c]ountries like Egypt, Indonesia, Poland and Chile also setting up digital aggregators of arts content so the public can still access cultural content during lockdown”.<sup>268</sup> In terms of ‘digital actions more broadly, the following list is indicative of some of the initiatives taking place across the world.

- Argentina’s Ministry of Culture announced ARS \$7.2 million for hiring nearly 500 artists to develop content for a ‘Culture at Home’ initiative, which is a virtual community of practice, facilitating remote access to Buenos Aires’ cultural offerings.<sup>269</sup>
- The Australian Broadcasting Corporation announced their AUD \$5 million ‘Fresh Start Fund’, which includes the commissioning of new music and music scholarship schemes.<sup>270</sup>
- Belgium’s ‘Culture at Home’ portal, provides links to cinemas, lectures, performing arts, museums and other initiatives.<sup>271</sup>
- Canada’s ‘Digital Strategy Fund, which offers grants of up to CA\$50,000 to implement digital solutions for long term strategies dealing with Covid-19.<sup>272</sup>

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<sup>267</sup> Jackie Bailey. ‘Government Responses to the Impact of Covid-19 on the Arts and Creative Industries’. In the separate article mentioned above, Bailey notes nations such as Australia, Canada, Poland, New Zealand, Italy, Ireland, France and England as good examples of those who have relaxed their social security schemes for freelancers and self-employed. See Jackie Bailey. ‘Governments Around the World Respond to Covid-19 Impact on the Arts’. *Arts Hub*, March 26 2020.

<sup>268</sup> Jackie Bailey. ‘Government Responses to the Impact of Covid-19 on the Arts and Creative Industries’.

<sup>269</sup> This is achieved via a central website, which incorporates a number of social media sites. See <https://www.buenosaires.gob.ar/culturaencasa>

<sup>270</sup> See <https://www.abc.net.au/events/freshstart/abc-fresh-start-development-fund/12168362>

<sup>271</sup> See <http://www.culture.be/index.php?id=17782>

<sup>272</sup> See <https://canadacouncil.ca/funding/strategic-funds/digital-strategy-fund>

Canada have also launched a ‘Digital Originals’ scheme, which offers artists micro innovation funds to position their work for online sharing.<sup>273</sup>

- The Chilean government has developed an online culture portal entitled Elige Cultura,<sup>274</sup> which houses numerous activities from across the nation, including music.<sup>275</sup> The Chilean Ministry of Culture is also offering online capacity building workshops for the cultural sector.
- Colombia have developed a national registry of artists and are sharing their creative culture as part of their creative strategy.<sup>276</sup>
- England’s ‘Culture in Quarantine’ fund, a partnership of Arts Council England and BBC Arts, facilitates artists (including musicians) to produce new work, with funds in the region of £3k-£8k.<sup>277</sup> Arts Council England have also developed their ‘Digital Culture Network, which assists creative businesses and individuals become more skilled in online environments.<sup>278</sup>
- The Irish Government are working with a range of industry stakeholders to ensure the country’s creativity continues to be showcased to the world.<sup>279</sup>

As lockdown measures have been eased, nations such as New Zealand, Denmark, Australia, and Germany are used as exemplars of countries who are developing specific recovery packages for the arts, with New Zealand allocating “NZ \$175 million over three years to re-start the arts sector,<sup>280</sup> Denmark initiating a 10 million

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<sup>273</sup> See <https://canadacouncil.ca/initiatives/digital-originals>

<sup>274</sup> See <https://eligecultura.gob.cl>

<sup>275</sup> See

[https://eligecultura.gob.cl/events/search/?query=&discipline=11&type=&institution=&venue=&region=&commune=&start\\_date=&end\\_date=](https://eligecultura.gob.cl/events/search/?query=&discipline=11&type=&institution=&venue=&region=&commune=&start_date=&end_date=)

<sup>276</sup> See <https://www.mincultura.gov.co/prensa/noticias/Paginas/CulturaDigital%2c-para-disfrutar-del-arte-y-la-cultura-desde-su-hogar.aspx>

<sup>277</sup> See <https://www.grantfinder.co.uk/coronavirus/launch-of-culture-in-quarantine-commissioning-fund-for-england-s-artists/>

<sup>278</sup> See <https://www.artscouncil.org.uk/developing-digital-culture/digital-culture-network>

<sup>279</sup> See <https://www.gov.ie/en/publication/ef1be0-online-cultural-resources/>

<sup>280</sup> \$16.5 million was specifically allocated to popular music – see <https://www.beehive.govt.nz/release/support-arts-and-music-sector-recovery>

DKK cultural assistance scheme for senior citizens affected by Covid-19,<sup>281</sup> Australia a \$250 million support package for their arts and cultural sectors,<sup>282</sup> and Germany allocating EUR 1 billion, via their ‘Neu Start’ for culture scheme. The Australian and German schemes are particularly interesting, with the former including seed investments to reactivate productions and tours, loans to fund new productions and financial assistance,<sup>283</sup> while the latter includes a 250 million euro allocation to ensure cultural institutions such as music venues are ‘fit for reopening’, financing the implementation of important ‘post-covid’ initiatives such as hygiene mechanisms, social distancing frameworks (including seating), online ticketing, ventilation systems, protective measures, visitor control and cleaning.<sup>284</sup>

As indicated, although Bailey’s report focuses on ‘arts and culture’ more generally, she does occasionally discuss music specific initiatives, with examples including, the French Government’s EUR 50 million allocation to the ‘National Music Centre’ to support the music industries, Cuba’s ‘Institute of Music’ promotion of online/virtual concerts (collaborating with the Ministry of Culture and the Cuban Institute of Radio and Television),<sup>285</sup> and Malaysia’s ‘Music from Home’ initiative, which included a series of ‘virtual concerts’ which assisted home grown artists produce digital content to engage with their audiences.<sup>286</sup>

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<sup>281</sup> See <https://www.artscouncil.org.uk/developing-digital-culture/digital-culture-network>

<sup>282</sup> See <https://www.pm.gov.au/media/250-million-jobmaker-plan-restart-australias-creative-economy> \$20 million has been allocated specifically to music over a 4 year period to assist venues get back on their feet. See [https://www.nme.com/en\\_au/news/music/the-governments-live-music-australia-program-wants-to-help-venues-get-back-on-their-feet-2724971](https://www.nme.com/en_au/news/music/the-governments-live-music-australia-program-wants-to-help-venues-get-back-on-their-feet-2724971)

<sup>283</sup> Some of Australia’s support networks are state specific and also targeted towards music, see <https://creative.vic.gov.au/coronavirus/financial-support/support-through-creative-victoria> and <https://creative.vic.gov.au/coronavirus/financial-support/other-government-support>

<sup>284</sup> Argentina, Canada, Chile, Columbia, Cuba, Czech Republic, Hong Kong, Indonesia, Ivory Coast, Lithuania, and Luxemburg are noted as having no ‘recovery’ protocols in place as of July 11<sup>th</sup>

<sup>285</sup> See <http://www.cadenahabana.icrt.cu/english/news/when-the-stages-sleep-20200413/> and <http://www.radiohc.cu/en/noticias/cultura/221835-may-brings-new-concerts-online-by-cuban-artists-also-on-radio-and-television>

<sup>286</sup> See <https://muzik.my>

According to an article written by the Worldwide Independent Network, governments around the world have had a tendency to promote the importance of company/organisation liquidity when supporting the cultural and societal impacts of the pandemic, via offering pervasive low rate or even interest free loans for example, which they note as being “hardly used by independent labels”.<sup>287</sup> The authors continue to verify what they consider the industry to need—“measures to defer payment of taxes or social contributions of workers and employers”.<sup>288</sup> Although potentially out of the control of many government agendas at the moment, the article considers one of the reasons that many artists and small labels around the world are struggling financially is due to what it describes as the ‘digital value gap’, where much of the mechanical income from music making is in the hands of technology giants such as You Tube, Facebook, Spotify and iTunes. The article concludes by noting that one objective of the 2018 ‘European Copyright Directive’, is to reduce the value gap between internet platforms such as these and the content creators themselves, something which will become essential in a post-covid world, where performance income may be restricted for some time to come.

The Worldwide Independent Network has also developed a useful map of global resources,<sup>289</sup> that various nations around the world have implemented, including public liquidity measures and grants awarded, in addition to private initiatives by collection societies, digital platforms and industry bodies. Although some of the information on the map has already been discussed in this section, what

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<sup>287</sup> Worldwide Independent Network. ‘The Independent Music Industry in Times of Covid-19’. *Worldwide Independent Network*. Available at: <https://winformusic.org/the-independent-music-industry-in-covid-19-times/> [Last Accessed September 24 2020]. Although no reason is given for this, it could be related to a range of factors, such as independent labels not being aware of the funding (which as outlined earlier, is an issue in Wales), or fans simply not having the income to purchase the products. Additionally, according to Messick when discussing the Heavy Metal market (2020), many of the factories that produced both CDs and vinyl were deemed ‘none essential workplaces’ in some nations, so were subsequently closed. See Kyle Messick. ‘Music Industry in Crisis: The Impact of a Novel Coronavirus on Touring Metal Bands, Promoters and Venues’. *OSF Preprints*. Available at: <https://osf.io/96ptk/> [Last Accessed September 23 2020].

<sup>288</sup> Ibid.

<sup>289</sup> For information on the Worldwide Independent Network, see <https://winformusic.org/mission-and-priorities/>

follows is a list of European ‘music specific’ initiatives taken from the website, that will hopefully provide ‘food for thought’ for Welsh Government.<sup>290</sup>

**Austria:** Austrian independent music companies association VTMÖ organised a campaign asking all radio and TV stations to broadcast twice as much music from Austria as usual, although to date only one private station has responded, featuring a new programme each day from 6 p.m. to 8 p.m., with 100% of the music from Austria.<sup>291</sup> Additionally, national radio (OE3) has announced 2 additional hours of music from up and coming young Austrian artists from Sundays to Thursdays 10 p.m. - 12 p.m.

**Belgium:** Implementation of the ‘Carry-back scheme’, where tax losses in 2020 can be measured against profits of 2019. Implementation of the ‘Carry forward scheme’, where losses in 2020 can be measured with profits in the next three years. The Belgian chart company Ultratop is pushing Belgian Music and has sent radio stations a list of recommendations. Additionally, the country’s #PlayLocal campaign is urging media companies to utilise more Belgian music.<sup>292</sup>

**Bulgaria:** Authors’ society MUSICAUTOR have called on Bulgarian media to play more national music on radio stations.

**Croatia:** An appeal for electronic media to play more local music has been launched.<sup>293</sup>

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<sup>290</sup> Independent Music Companies Association. ‘Impala Covid-19 Mapping’. Available at: <https://www.impalamusic-covid19.info> [Last Accessed September 24 2020].

<sup>291</sup> Radio 88.6 - see <https://www.instagram.com/p/B9yzlJXFxGk/>

<sup>292</sup> See <https://www.belgianentertainment.be/en/bea-news-blog/2020/3/26/playlocal-play-belgian-music-and-support-artists-from-belgium>

<sup>293</sup> See <https://hdu.hr/2020/03/18/apel-radijskim-i-televizijskim-postajama-i-medijima-slusajmo-hrvatsko>

**Czech Republic:** A €40m package specifically for live music has been agreed though not yet formally approved, with the main recipients being festivals, concert organizers, clubs and venues.

**Denmark:** National radio are increasing their national repertoire from 41% to 80% in order to support the local music scene. Additionally, a small number of media outlets are providing free advertising.<sup>294</sup>

**Finland:** Rights society Gramex have paid €11m to musicians and producers ahead of time. The Finnish independent music companies association (IndieCo) launched an ‘Indie Hour’ social media campaign, which encouraged the public to listen to any domestic indie music only between 11:00 and 12:00 on March 20. People were advised to create and post their own playlists using the #indiehour.<sup>295</sup>

**France:** Radio France announced on 15 April an initiative to support the French music scene by playing more French music, promoting cancelled festivals via different radio programmes and launching the #RadioFranceAvecLaScèneFrançaise campaign.<sup>296</sup>

**Italy:** 10% of government ‘private copy levy’ income is going to artists, songwriters and freelance workers, estimated to be worth around €13m. Cultural workers and non-profit organisations can access unemployment benefits. Radio Rai is broadcasting more concerts by Italian artists live.

**Netherlands:** Government has entered into talks with the arts and culture sector in order to make sure that it benefits from the generic measures, as well as from potential sector-specific measures where necessary. Collection society SENA

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<sup>294</sup> See <https://kum.dk/covid-19/hjaelpepakker-og-initiativer/mere-dansk-musik-i-radioen/>

<sup>295</sup> It is currently unclear if this is still continuing.

<sup>296</sup> See <https://www.radiofrance.fr/presse/radio-france-se-mobilise-pour-soutenir-la-filiere-musicale>

has set up a special fund of €200,000, through which artists can apply for a loan in order to go into the studio and create new music. Both Buma Stemra and SENA collection societies (and the Dutch music Industries as a whole) have requested an increase of Dutch music played on radio, but reactions thus far have been slow.

**Norway:** The public service broadcaster NRK is playing over 50% local music on some of its channels. Additionally, between 24th to 27th March, it committed to broadcasting only Norwegian music.<sup>297</sup>

**Poland:** The Polish Song Museum in Opole has appealed to public and private radio, television and internet broadcasters to take part in the #grajmypolsku campaign, which highlights the importance of broadcasting Polish music. As a result of this campaign, Radio Gdańsk now dedicates three hours daily to the music of Polish performers. Radio ZET also now dedicates one hour per day to Polish music.

**Portugal:** A new radio station has been launched entitled ‘play it safe’, which features live intimate ‘home concerts’ and interviews supporting local artists. The station website (which is in English) encourages the public to donate, purchase local music and contribute play lists.<sup>298</sup>

**Romania:** Radio Romania Cultural has increased its quota of broadcasting Romanian based artists.

**Switzerland:** The Worldwide Independent Network notes the national radios of Switzerland to be significantly promoting national music, with some noted as broadcasting only local artists.

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<sup>297</sup> See [https://www.nrk.no/informasjon/nrk\\_og-norsk-musikk-1.14950681](https://www.nrk.no/informasjon/nrk_og-norsk-musikk-1.14950681)

<sup>298</sup> See <https://www.playitsafe.pt>

As can be seen from this list, a large number of European nations have committed to increasing the amount of national music that is broadcast on radio in particular, which appears to be a useful way of increasing the income stream of songwriters in particular, especially if mechanical rights income can be brought forward (as many nations are doing). The Worldwide Independent Network map is also complemented by one initiated by the International Federation of the Phonographic Industry (IFPI), who have also documented a worldwide ‘covid response tracker’,<sup>299</sup> facilitating access to general government, in addition to sector specific initiatives. Although information is documented on strategies from around the world, what follows below once again are indicative samples of initiatives from Europe, from institutions such as record companies, collection societies, the live sector and digital service providers.

**Belgium:** The Belgium Music fund has been created by grouping together several music industry organisations, with the intension of support artists impacted by covid and to initiate creative projects, including production, promotion, presentation, internationalisation and export.<sup>300</sup>

**Bulgaria:** Collection society Prophon is making 6 month advance payments to its members.<sup>301</sup>

**Croatia:** Collection society Zapraf are lobbying the government in order to ensure the record industry is supported, with an aim of developing a crisis fund for labels.<sup>302</sup>

**Czech Republic:** Including festival organisers, producers, publishers, managers, performers and collection societies, CNS IFPI are communicating unified issues and ideas to the Czech Government.<sup>303</sup>

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<sup>299</sup> See <https://musicresponsecovid-19.ifpi.org>

<sup>300</sup> See <https://www.belgianmusicfund.be/?lang=en>

<sup>301</sup> See <https://www.prophon.org>

<sup>302</sup> See <http://www.zapraf.hr/hr/2020/03/27/mjere-za-spas-glazbene-industrije/>

<sup>303</sup> See <https://musicresponsecovid-19.ifpi.org/www.ifpicr.cz>



**Denmark:** As with the Czech Republic, IFPI Denmark are communicating with the Danish government,<sup>304</sup> with Dansk Live acting in a similar capacity for the live music sector.<sup>305</sup>

**Finland:** 160 Finish artists have released a charity song, with all proceeds going to Finish Red Cross.<sup>306</sup>

**France** As indicated earlier, a new public body, the National Music Centre, has been newly established to bring together all of the stakeholders in the French music industries, financed by a 11.5 million endowment and contribution from the collection society SECEM and the performers' CMO.

**Italy:** As with Finland but in association with Amazon, 50 Italian star names have recorded a track in support of the Red Cross.<sup>307</sup>

**Norway:** As with a number of collection societies around the world, Gramo have processed early payments to artists, with it being noted that 90% of payments were processed by March 23<sup>rd</sup>.<sup>308</sup>

**Poland:** The 'Music Export Poland Foundation' has listed all music industry support on its website, in addition to initiating research into the impacts of the pandemic.

**Switzerland:** IFPI Switzerland are conducting a rolling research programme (updated every month) which investigates the ongoing impacts of the pandemic on the music industries.<sup>309</sup>

To conclude this chapter, I would like to draw attention to the work of the Independent Music Companies Association (IMPALA), who have provided not only a

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<sup>304</sup> See <http://www.ifpi.dk/>

<sup>305</sup> See <http://dansklive.dk/artikler/de-vigtigste-hjaelpepakker>

<sup>306</sup> See <https://www.youtube.com/watch?v=jdvLOtAW2Ao>

<sup>307</sup> See <https://www.youtube.com/watch?v=7GltOxCYVZQ&feature=share>

<sup>308</sup> See <https://www.gramo.no/jeg-lager-musikk/utbetaling>

<sup>309</sup> See <https://www.ifpi.ch>

useful overview of the various initiatives collection societies in Europe have implemented to financially assist their respective independent music industries,<sup>310</sup> but also an outline ‘recovery map’.<sup>311</sup> On their home page, IMPALA note how music was one of the first sectors to suffer in Europe, after the pandemic emerged in early 2020, resulting in them initiating a music industries taskforce, who were charged with monitoring the developing situation. The 10-step ‘recovery roadmap’, which was linked to a broader EU recovery plan,<sup>312</sup> can be summarised as follows.<sup>313</sup>

**Step 1** – For governments to recognise music and culture as priority sectors (May 2020). This includes developing a 5-year recovery strategy.

**Step 2** – Co-ordinating de-confinement and mobility strategies across Europe (now onwards). The plan suggests that record stores should be part of the ‘first wave’, with a ‘co-ordinated’ approach suggested for music venues. “Another element is making sure that artists and cultural workers are part of the EU’s mobility plans for safe and appropriate travel”.<sup>314</sup>

**Step 3** – Allocating sector specific EU and national crisis funds (May 2020), including the initiation of crisis funds.

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<sup>310</sup> Independent Music Companies Association. ‘Collection. Societies Mobilisation’. Available at: <https://www.impalamusic-covid19.info/collecting-societies-mobilisation> [Last Accessed September 24 2020].

<sup>311</sup> Independent Music Companies Association. ‘Impala’s Recovery Roadmap’. Available at: <https://www.impalamusic-covid19.info/impalas-recovery-roadmap> [Last Accessed September 24 2020].

<sup>312</sup> European Commission. ‘Recovery Plan for Europe’. *European Commission*. Available at: [https://ec.europa.eu/info/live-work-travel-eu/health/coronavirus-response/recovery-plan-europe\\_en](https://ec.europa.eu/info/live-work-travel-eu/health/coronavirus-response/recovery-plan-europe_en) [Last Accessed September 24 2020].

<sup>313</sup> Although not mapping in the traditional sense, the International Music Council have also documented a page dedicated to global music related responses to the pandemic – see International Music Council. ‘Covid-19 Resource Centre’. Available at: [http://www.imc-cim.org/news-imc/imc-news/6393-covid-19-initiatives.html?utm\\_source=newsletter\\_313&utm\\_medium=email&utm\\_campaign=music-world-news](http://www.imc-cim.org/news-imc/imc-news/6393-covid-19-initiatives.html?utm_source=newsletter_313&utm_medium=email&utm_campaign=music-world-news) [Last Accessed September 24 2020]. The UK Monetary Fund also offers an interesting ‘policy tracker’, which enables one to find data from around the world such as when covid-19 was first identified in specific nations, how it is progressing, its impact on employment and what measures (funding and organisational) have been put in place to assist. Although not music or indeed arts/creative industry specific, the website does provide important information on how lockdown measures are being restricted and monitored, including performance venues. See International Monetary Fund. ‘Policy Tracker’. Available at: <https://www.imf.org/en/Topics/imf-and-covid19/Policy-Responses-to-COVID-19> [Last Accessed September 24 2020].

<sup>314</sup> Independent Music Companies Association. ‘Impala’s Recovery Roadmap’.

**Step 4** – Adopting 5-year state aid framework (May 2020) to assist boosting the liquidity of small and medium businesses in music and culture, without the usual limits such as maximum aid ceilings.

**Step 5** – Increasing allocation for culture in future EU budgets (May 2020). Due to the UK no longer being in the EU, this will have to be implemented directly via the UK and devolved governments.

**Step 6** – Boosting loans for small and medium businesses (May 2020), with the roadmap recommending Interest-free long-term loans with delayed repayments.

**Step 7** – Granting VAT holidays and longer-term measures (when retail stores re-open).

**Step 8** – Adopting national tax credit schemes (by September 2020) for small to medium size businesses who are investing in creation. The road map notes that in France, “every euro spent in this mechanism generates 3 euros for the public purse”.<sup>315</sup>

**Step 9** – Implementing the EU copyright directive. As indicated earlier, the importance of addressing the ‘value gap’ (between streaming platforms and creators) is considered essential via the implementation of a strong copyright framework.

**Step 10** – Reviewing tools to value music and culture properly (September 2020 to January 2021). The roadmap suggests two key mechanisms. 1) Allowing better valuation of intangible assets like copyright (needs a change of standard accounting principles). 2) Revising NACE codes so the music sector can be properly valued.<sup>316</sup>

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<sup>315</sup> Ibid.

<sup>316</sup> NACE (Nomenclature des Activités Économiques dans la Communauté Européenne) is a European industry standard classification system for classifying business activities. This classification scheme allows economists and others to compare companies’ economic activities on a statistical basis. In terms of the non-

Many of these suggestions are also outlined elsewhere in this report, some of which have been taken forward as recommendations to Welsh Government in the next chapter.

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governmental non-European initiatives that other nations are offering which Wales could potentially benefit from, the New Zealand based 'Music Helps' portal offers a donation page to enable the general public to assist those impacted by covid-19. They also offer an ongoing 24 hour 'wellbeing' service for those in the New Zealand music industry. The charity appear to have a similar remit to Community Music Wales. See <https://musichelps.org.nz/2020/03/covid-19-information-and-support-for-kiwi-music-people/>

## Conclusion

As this report has verified, although there are expected variations in support mechanisms around the world, what is universal is the acceptance of the economic, social and cultural importance of arts and culture to society. The music industries, which cross the ‘art-cultural’ divide, play a vital part of this contribution in Wales. Ranging from the network of grassroots venues throughout Wales, to larger venues such as St. Davids Hall and the Millennium Centre, to music festivals such as Greenman and Focus Wales, to the emerging reputation of Welsh artists more generally, it is important to highlight that music not only provides economic returns,<sup>317</sup> but also makes an invaluable contribution to Welsh society and culture more broadly. Music has the capacity to bring local, national and international stakeholders together; plays a vital role in community adhesion; assists songwriters, performers and audiences navigate their identities, and has proven potentials to improve mental health—all essential factors as many people in Wales attempt to navigate the significant isolation they are presently experiencing.

Via national schemes such as Anthem,<sup>318</sup> Launchpad and Horizons,<sup>319</sup> more localised ones such as Forté, and the inauguration of innovative government bodies such as Creative Wales—Welsh Government and the Arts Council of Wales have made significant inroads into supporting the popular music industries, in particular over the last decade. However, despite this support, it is important to remember that significant issues were still apparent prior to the emergence of Covid-19, with venues such as TJs in Newport and Barfly, Dempsey’s, The Point and more recently Gwdihw in Cardiff, all closing in the last decade.

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<sup>317</sup> According to the Worldwide Independent Network (which connects and supports independent music trade organisations globally), “music contributes far more to countries than what it receives in public budgets”. See Worldwide Independent Network. ‘The Independent Music Industry in Times of Covid-19’.

<sup>318</sup> See <https://www.anthem.wales/about>

<sup>319</sup> Arts Council of Wales. ‘Launchpad Fund to Help Welsh Musicians Take the Next Step. *Arts Council of Wales*, January 27 2020. Available at: <https://arts.wales/news-jobs-opportunities/launchpad-fund-help-welsh-musicians-take-next-steps> [Last Accessed September 24 2020].

Indeed, it is estimated that 20% of small venues have closed their doors in the 15-year period between 2004-2019 across the UK,<sup>320</sup> largely due to overly expensive business rates and in some cases, issues associated with ‘noise disturbances’.<sup>321</sup> Although not an exhaustive list, other issues existing prior to the pandemic include the working relationships between the music sector and local councils on sympathetic licencing; problematic transport infrastructures; career progression for music industry stakeholders wanting to remain in Wales; talent development; preventing the export of talent to England; the sharing of good practice on factors such as health and safety; strategic working relationships between music industry stakeholders; lack of rehearsal rooms; assisting younger audiences appreciate the value of grassroots music making; retaining more of the income generated via the Welsh music industries, and problematic touring networks.

In terms of the musicians themselves, the Musicians’ Union reported in 2018 that 44% of orchestral musicians don’t have enough to live on, forcing them to abandon their careers,<sup>322</sup> with 43% having to undertake unpaid work in order to gain experience, a factor which is extremely pervasive in the grassroot music industry.<sup>323</sup> Related to this, the 2017 ‘Live Music Census’, also verified how 68% of musicians across the UK found it difficult to make a living from music related activities, with over half (54%) of those classifying

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<sup>320</sup> Tom Hall. ‘20% of UK’s Small Venues Closed Over 15 Years, Says Study’. *Access All Areas*, November 7 2019. Available at: <https://accessaa.co.uk/20-of-uks-small-venues-closed-over-15-years-says-study/> [Last Accessed September 24 2020]. For a map of UK small music venues, including those in Wales, see Insure 4Music. ‘Small Music Venues Index’. Available at: <https://www.insure4music.co.uk/venue-index/venues> [Last Accessed September 24 2020].

<sup>321</sup> Some estimate that the number of grassroot venues closing is nearer to 35%. See Molly Hookings. ‘Grassroot Music Venues Hail Announcement to Cut Business Rates’. *Event Industry News*. Available at: <https://www.eventindustrynews.com/news/grassroots-music-venues-hail-announcement-to-cut-business-rates> [Last Accessed September 24 2020].

<sup>322</sup> Musicians’ Union. ‘Britain Risks “Cultural Void” as Funding Cuts Threaten the Future of Orchestras’. *Musicians’ Union*, May 2 2020. Available at: <https://www.musiciansunion.org.uk/Home/News/2018/May/Britain-risks-cultural-void?feed=801abc79-dc9c-471a-85ff-4a3a36bf8a3b> [Last Accessed September 24 2020].

<sup>323</sup> Ibid.

themselves as professional stating they had worked for free in the previous 12 months.<sup>324</sup>

When placing all of these pre-existing issues under the magnifying glass of a ‘post-covid’ world, it is apparent that Welsh Government has a significant challenge when considering how to support a broken music industry, that already had significant issues.

The unprecedented impact of Covid-19 on the UK music industries in March was closely followed by a range of initial ‘impulse’ initiatives across the globe, ranging from venues such as Ronnie Scotts (in London) and Smalls Jazz Club (in New York) streaming selected concerts to empty rooms; to both famous and less well known musicians performing live on social media from their homes (with some asking for donations); to music teaching moving online; to existing ‘virtual performance’ spaces such as Stageit offering monetised opportunities for audiences to see some artists ‘live’.<sup>325</sup> Indeed, as outlined by Rendell,<sup>326</sup> virtual performance initiatives such as these have also been extended to gaming platforms such as Twitch.TV, which now has a dedicated streaming channel from Amazon Music amongst others.<sup>327</sup> However, as noted by Savage, although shows such as these “provide a much-needed creative outlet and sense of community for artists and fans alike [...], they [usually don’t] make up for the loss of income”.<sup>328</sup> As verified earlier, although ‘virtual concerts are mentioned in Welsh Government’s ‘Creative Industries: Guidance for a Phased Return’ document (an expected activity as part of the ‘red’ category of its three point ‘post lockdown’ traffic light system), no advice is given in terms of how this type of concert can be

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<sup>324</sup> Emma Webster et. al. ‘UK Live Music Census: The UK Live Music Census 2017 Report’. Available at: <http://uklivemusiccensus.org/wp-content/uploads/2018/03/UK-Live-Music-Census-2017-full-report.pdf> [Last Accessed September 24 2020].

<sup>325</sup> See [https://www.stageit.com/static/static\\_pages/what\\_is\\_stageit](https://www.stageit.com/static/static_pages/what_is_stageit)

<sup>326</sup> James Rendell (forthcoming). ‘Staying In, Rocking Out: Online Live Music Portal Shows During the 2020 Coronavirus Pandemic’.

<sup>327</sup> See

[https://www.twitch.tv/amazonmusic/?%243p=a\\_twitter&\\_branch\\_match\\_id=797722487301029839&utm\\_campaign=Mediahub%20UK\\_Amazon%20Music\\_Q3%202020\\_UK\\_Twitter\\_Streaming-KW\\_Pre-1-5-Image&utm\\_medium=paid%20advertising&utm\\_source=Twitter](https://www.twitch.tv/amazonmusic/?%243p=a_twitter&_branch_match_id=797722487301029839&utm_campaign=Mediahub%20UK_Amazon%20Music_Q3%202020_UK_Twitter_Streaming-KW_Pre-1-5-Image&utm_medium=paid%20advertising&utm_source=Twitter)

<sup>328</sup> Mark Savage. ‘Pop Stars Live Stream Concerts From Home to Combat Isolation’. *BBC News*. Available at: <https://www.bbc.co.uk/news/entertainment-arts-51924765> [Last Accessed September 24 2020].

monetised. An article in the Guardian reiterated both the negative aspects and potential positives of virtual concerts, noting that despite ‘kitchen table’ and ‘drive in gigs’ flourishing, small venues and many artists are still struggling—a phenomena, as noted in this report, we know only too well in Wales.<sup>329</sup>

Mark Davyd from the Music Venue Trust considers the pandemic to have highlighted a series of issues with the existing funding infrastructures of the UK music industries, which prompted him to ask an important overarching question when interviewed:

How is it possible for so many of our musicians, artists and songwriters to be so devastated by this crisis, when the truth is the crisis has only affected 25% of the economic activity [...]. My question is this—If 25% of your income goes walking off that looks pretty bad, but you should still have the other 75%—where is it?<sup>330</sup>

This very question prompted the following quote in a DCMS select committee report published in July, on the impact of Covid-19 on its sectors.

The loss of live music during Covid-19 has brought into clearer view the concerns of musicians, songwriters and composers, regarding their earnings from the streaming of recorded music. This matter was raised with the Secretary of State when he appeared before us. **The Department should investigate how the market for recorded music is operating in the era of streaming to ensure that music creators are receiving a fair reward** [bold as per original].<sup>331</sup>

In October, this recommendation was eventually accepted, when DCMS sanctioned an inquiry into the economics of music streaming, noting that the department needs to consider

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<sup>329</sup> Kitty Empire. ‘The Future of Music: No one has Anything Positive to Say About Physically Distanced Gigs-At All’. The Guardian, June 21 2020. Available at: <https://www.theguardian.com/music/2020/jun/21/the-future-of-the-arts-no-one-has-anything-positive-to-say-about-physically-distanced-gigs-at-all> [Last Accessed October 14 2020]. Having attended a number of virtual concerts since the pandemic started, Empire believed that despite “no one [having] anything positive to say about physically distanced gigs”, monetised live streaming is a potential way forward, noting K-Pop stars BTS performing to 756,000 people “across 107 regions globally”, in addition to a virtual Lewis Capaldi charity gig “selling more tickets than his earlier London shows”.

<sup>330</sup> Davyd in conversation with Paul Carr, July 24<sup>th</sup> 2020.

<sup>331</sup> DCMS (2020), ‘Impact of Covid-19 on DCMS Sectors’.



if the UK government should take action to “protect the industry from piracy in the wake of steps taken by the EU on copyright and intellectual property rights”.<sup>332</sup> If live performances in Wales are going to continue to be restricted as they have been over the last eight months, this is a conversation Welsh Government also need to be involved in, to ensure that the income streams of its songwriters in particular are fairly compensated.

Concerning live music, a recent article by Jessica Williams asked if live music was ‘broken’ before Covid-19, quoting New York based Hannah Cohen’s tweet which verified how she did not miss touring, regarding it as a “bottomless pit of expenses [and] emotionally and physically exhausting”.<sup>333</sup> She continued: “I rarely break even. Actually, I’ve never “broke even”! I will spend this break in touring slowly chipping away at my tour debt”.<sup>334</sup> Similar stories are also outlined by artists such as Shura, who lamented how low returns from streaming result in touring being the “primary form of income”—which is not sustainable for many.<sup>335</sup> Although Welsh Government has limited potential to directly impact ‘big questions’ such as these, it does have the capacity to work alongside committees such as DCMS and/or the UK government, in addition to other home nation and European stakeholders to place pressure on oligopolist corporations such as Apple, Spotify, Amazon and Google, to ensure music creatives receive fair remuneration for their intellectual property.

In addition to pre-existing issues such as these, the pandemic has also of course introduced a new series of problems for Welsh Government to engage with, which will be the main focus of the action points contained in this final chapter. It is apparent that the Welsh music industries require a new ecology, which is realistically funded, has equitable audience

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<sup>332</sup> See <https://committees.parliament.uk/work/646/economics-of-music-streaming/>

<sup>333</sup> Jessica Williams. ‘Three People in a Car and We Still Lost Money’. *The Guardian*, August 20 2020. Available at: <https://www.theguardian.com/culture/2020/aug/20/tour-lost-money-live-music-broken-covid-19-concerts> [Last Accessed September 24 2020].

<sup>334</sup> Ibid.

<sup>335</sup> Ibid.

access and up to date training; a music industry which has support mechanisms based on Welsh music industry statistical data and clear forward planning; a music industry which encompasses the complex interrelationships of professional and semi-professional (part time) stakeholders. Additionally, if ‘virtual performances’ are going to be an integral part of the post-covid music industries as indicated in Welsh Government guidelines,<sup>336</sup> it goes without saying that Wales as a nation is going to require fast reliable broadband provision, which everyone has access to. The arts more broadly have often been accused of not facilitating equal access to its various sub-sectors, but Welsh Government also need to be made aware that a move toward more online provision has the potential to not alleviate this trend, but to exacerbate it, for those (audiences and music industry stakeholders) currently experiencing ‘digital poverty’. As outlined in a recent blog post by Cambridge University, “the public health crisis currently gripping the UK stands to make the impacts of digital exclusion worse for the millions of people affected, and the poorest will be hit the hardest”.<sup>337</sup>

Finally, across the music industries of the world, the pandemic has brought with it not only financial challenges, but also potential associated mental health issues, as jobs and lifelong passions have seemingly disappeared and social gatherings (small and large) have been restricted at best—resulting in isolation, loneliness and despondency. Sadly, this is also a factor that the Welsh Government need to be fully prepared for. As outlined in a recent Culture, Welsh Language and Communications Committee evidence gathering session on October 15, it was considered important that in order to achieve objectives such as these, Welsh Government needs to *collaborate* with a range of music industry and education stakeholders, not only *consult* with them.

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<sup>336</sup> Virtual performances can be considered as taking place in three ‘spaces simultaneously’—audience space; performer space and the space through which audiences can interact with each other (the chat room).

<sup>337</sup> Hannah Holmes and Gemma Burgess, “Pay the Wi-Fi or Feed the Children”: Coronavirus has Intensified the UKs Digital Divide’. University of Cambridge. [Last Accessed October 16 2020].

Based on data contained in this report, what follows is a series of recommendations, for the Culture, Welsh Language and Communications Committee to consider and prioritise, prior to communicating with Welsh Government. These recommendations are split up into the following six themes: Reopening and Recovery Strategies, Research, Strategic Opportunities and Promotion, Policy, Education, and Funding.

At the time of concluding this report in late October, the creative industries in Wales were still facing an existential threat that is challenging the livelihoods of many sub-sectors of the music industries, so although a report such as this cannot address all of the issues, it is hoped that it provides a constructive start.

### **Recommendations for Action**

#### *Reopening and Recovery Strategies*

**Recommendation 1:** For Welsh Government to develop a detailed and clear short-term reopening strategy for the Welsh music industries, which outlines what is possible now; what is not possible yet; what will never be possible and what support will be available for all of these outcomes. This strategy should closely consider how sub-sectors that are open for business can maximise income, in addition to considering closely how it can support the strategically important parts of the industries that are closed for public health reasons get back on their feet.

**Recommendation 2:** In conjunction with relevant expertise from the music industries, the university sector and the Arts Council of Wales, for Welsh Government to develop a long-term three-year music industries recovery strategy, which takes the ongoing impact of Covid-19 into account. This plan should have a range of outcomes and consider via an action plan factors such as how it can sustain, retain and incubate talent; how public confidence can be re-established; how the various parts of the music industries can be supported and invigorated; how realistic alternative business models can be implemented; how industry

training can meet the needs of the ‘new sector’; and how the technical infrastructures of venues/rehearsal rooms/recording studios can become ‘covid-proof’.

*Research, Strategic Opportunities and Promotion*

**Recommendation 3:** For Welsh Government to commission detailed research into the role music plays in the Welsh economy and the impact of covid-19 on its sub-sectors. In addition to outlining the financial, societal and cultural contribution of the music industries various sub-sectors, the research should identify gaps in the ‘talent pipeline’ that exist as a result of sub-sectors closing. The overarching objective of this work should be to verify how much income the Welsh music industries generate; how much currently remains within Wales; and what can be done to ensure the nation (i.e music industry stakeholders) can retain more of it.

**Recommendation 4:** For Welsh Government to build on the venue mapping research that has already taken place, by financing a searchable public facing database of the Welsh music industries and an interactive map of its music venues,<sup>338</sup> which outlines venue types throughout the country and how these resonate locally, nationally, globally and ecologically.<sup>339</sup> This map and database should be regularly updated.

**Recommendation 5:** For Creative Wales to develop and agree upon a comprehensive Taxonomy of the music industries in Wales, to ensure all relevant sub-sectors are supported and represented.

**Recommendation 6:** For Creative Wales to review its membership to ensure it reflects relevant expertise related to the aforementioned taxonomy.

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<sup>338</sup> Via a digital portals similar to Wales Screen service (see <https://businesswales.gov.wales/walescreen/>) and the Birmingham Live Music Map (see <https://livemusicresearch.online/blmp/>).

<sup>339</sup> Including not only music industry stakeholders such as cafes, bars, restaurants (which feature music), concert halls and grassroot music venues, but also extended stakeholders such as transport infrastructures and hotels. This can be extended further to include businesses such as night clubs, cinemas, department stores, supermarkets, in addition to factors such as affordable housing and parking facilities.

**Recommendation 7:** For Creative Wales to consider the viability of not only promoting Welsh talent, but also, following European nations such as France, Norway, Denmark and Switzerland, to set the necessary protocols in place for Welsh music to be prioritised on radio and T.V, working with UK Government when necessary.

**Recommendation 8:** As part of a digital strategy, for Welsh Government to 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. This digital strategy should ensure that all households in Wales have access to fast reliable broadband.

### *Policy*

**Recommendation 9:** To ensure the general public continue to have access to a broad range of live music, for Welsh Government to work with local councils in order to action ongoing business rate relief and flexible licencing (for pop up events and busking for example), in addition to ensuring the ‘agent of change’ principle is implemented.

**Recommendation 10:** For Welsh Government to consider the viability of changing from a ‘mixed economy’ grant funding model,<sup>340</sup> to one which relies less on commercial income.

**Recommendation 11:** For Welsh Government to work with UK Government departments such as DCMS to reduce the ‘value gap’ for Welsh artists (the gap between a music creator’s income and the commission of ‘tech giants’).

### *Education*

**Recommendation 12:** For Welsh Government to ensure that the various skills required in the ‘new music industries’, are reflected in school, college, university and private industry curriculums.

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<sup>340</sup> Where organisations are expected to generate large percentages of commercial income.

**Recommendation 13:** For Welsh Government to begin to consider and plan for the potential of a mental health crisis in the music industries, as the creative job market continues to be decimated as a result of the pandemic.

*Funding*

**Recommendation 14:** For Welsh Government to work with Arts Council Wales to ensure funding is available equitably across the music industries, and that the grant application process is demystified, reaching deep into the various networks of the music industries.

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## Appendix 1

### List of Venues in Wales Represented by the Music Venue Trust

Venue Name	Town/City
Neuadd Ogwen	Bethesda
Hobos Music Venue	Bridgend
Tivoli Venue	Buckley
Clwb Ifor Bach	Cardiff
Fuel Rock Club	Cardiff
Globe (The)	Cardiff
Live Lounge (The)	Cardiff
Moon (The)	Cardiff
Tramshed	Cardiff
Pavilion Mid Wales	Llandrindod Wells
Le Pub	Newport
Clwb y bont	Pontypridd
Green Rooms (The)	Rhondda Cynon Taff
Bunkhouse (The)	Swansea
Creature Sound Ltd	Swansea
Garage (The)	Swansea
Sin City	Swansea
Patti Pavilion	Swansea
Hangar 18 Music Venue	Swansea
Central live music venue wrexham	Wrexham
Castle Bar (Castle Hotel)	Abersystwyth
Porters	Cardiff
Tiny Rebel Cardiff	Cardiff
Blue Bell (The)	Conwy
Patriot (The)	Crumlin
Mcleans Pub	Deeside
Y Llew Coch Mach	Machynlleth
Dragonffli (The)	Pontypool
Uplands Tavern	Swansea
The Pembroke Yeoman	Haverfordwest
The Foresters	Blackwood
Crowleys Rock Bar	Swansea
McCanns Rock Bar	Newport
The Perch Swansea	Swansea
Big Top (The)	Cardiff
Undertone basement of 10 Feet Tall	Cardiff
Glee Club	Cardiff
Courtyard (The)	Newport
Warehouse 54	Newport

Blackwood Miners' Institute	Blackwood
Ocean Arts Cardiff	Cardiff
Tabernacle (the)	Llandudno
Willows Centre Troedyrhiw	Merthyr Tydfil
The Lost ARC	Rhayader
Pontardawe Arts Centre	Swansea
CWRW	Carmarthen
Queens Hall (The)	Narberth
Elysium Gallery and Venue	Swansea
Cinema & Co.	Swansea
Globe at Hay	Hay on Wye
The Westgate	Newport
Cellb	Blaenau Ffestiniog
The Flute and Tankard	Cardiff
Saith Seren	Wrexham
The North	Rhyl

## Appendix 2

### List of Music Industry Sectors as Outlined by UK Music<sup>341</sup>

<b>UK Music</b>
<b>Music Creators</b> musician
composer
songwriter
lyricist
singer
producer
engineer
<b>Music Retail</b> retail of musical instruments
manufacture of musical instruments
digital music retail
physical music retail
<b>Recorded Music</b> recorded rights holders
record labels
physical manufacturing & distribution
digital distribution
recording studios
<b>Music Representatives</b> collective management organisations
music managers
music trade bodies
music accountants
music lawyers
<b>Music Publishing</b> publishing rights holders
publishing companies
<b>Live Music</b> music festival organisers
music promoters
music agents
production services for live music
ticketing agents - proportion of their activities involved with live music
concert venues and arenas - the proportion of their activities involved with live music

<sup>341</sup> Taken from *Music by Numbers*, page 8. See [https://www.ukmusic.org/assets/general/Music\\_By\\_Numbers\\_2019\\_Report.pdf](https://www.ukmusic.org/assets/general/Music_By_Numbers_2019_Report.pdf)

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