



SOUND
DIPLOMACY

CARDIFF

MUSIC ECOSYSTEM STUDY AND STRATEGIC RECOMMENDATIONS

Executive Summary

ABOUT THE PROJECT

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

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

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

The format of the full report is separated into the following sections:

CONTEXT

Gives an overview of the current state of the UK's music industry, and Cardiff's place within it.

CARDIFF'S MUSIC ECOSYSTEM

Provides a comprehensive snapshot of the current state of the city's music ecosystem, based on extensive research in a number of key areas. These areas are: an economic impact of Cardiff's music ecosystem; findings from Sound Diplomacy's mapping of Cardiff's music ecosystem; and key findings on the current state of things from sectors including governance and leadership; licensing; education; planning; funding; transport; employment and skills; tourism and branding; spaces and places; and assets and threats.

STRATEGIC RECOMMENDATIONS

This section is constituted of 12 recommendations addressing the following areas. Governance and Leadership; Spaces and Places; Education; Artist Development; Professional Development; Audience Engagement; and Music Marketing. Each recommendation comes with 1 or more suggested Priority Action and/or Next Step, as well as a case study from around the world showing best practice.

This study was prepared by the request of Cardiff Council. The content of this study does not reflect the official opinion of Cardiff Council. Responsibility for the information and views expressed in the study lies entirely with the authors.

Front & Back Cover Image courtesy Tafwyl Festival

METHODOLOGY

Sound Diplomacy developed a unique 4-pronged methodological approach to deliver a comprehensive assessment of Cardiff's music ecosystem:

STEP 1: ECOLOGICAL IMPACT ASSESSMENT

We completed comprehensive desk research and literature review, and delivered an in-depth regulatory assessment to gain an understanding of current policy and regulations.

STEP 2: STAKEHOLDER ENGAGEMENT

The survey and industry interviews acted as an integral source of context. Over 1000 individuals engaged with the Cardiff Music Strategy survey and their responses were successfully analysed. We also conducted a series of roundtables and personal interviews with over 100 stakeholders throughout the process.

STEP 3: QUANTITATIVE RESEARCH

Analysis of official statistics, primary data developed by Sound Diplomacy and results from the survey enabled the creation of an in-depth study of the economic impact of Cardiff's music ecosystem.

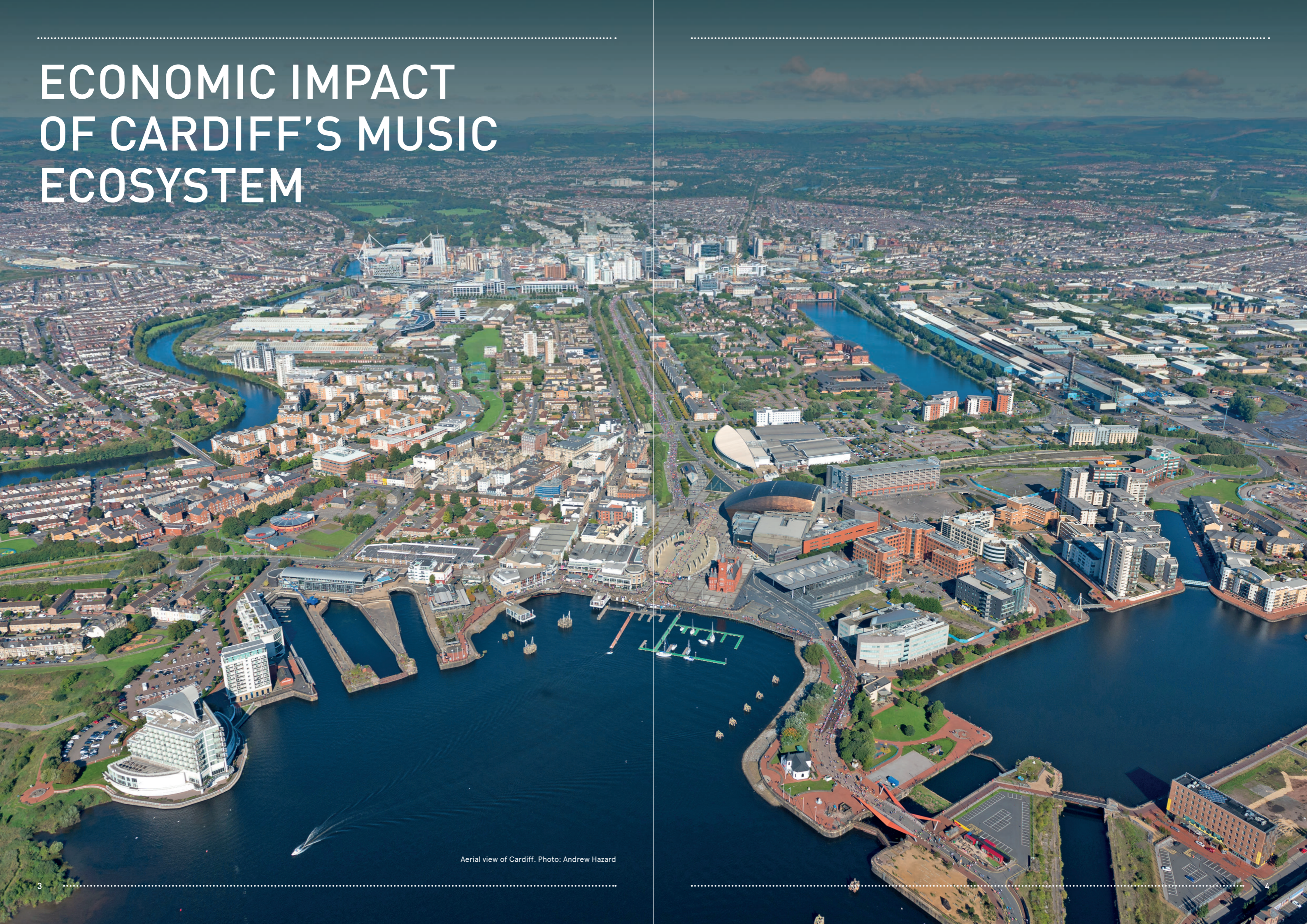
STEP 4: ANALYSIS OF FINDINGS AND RECOMMENDATIONS

A comprehensive plan for the development of Cardiff's music ecosystem based on the analytical work previously completed.



Hub Festival. Photo: Jonathan Baker

ECONOMIC IMPACT OF CARDIFF'S MUSIC ECOSYSTEM



Aerial view of Cardiff. Photo: Andrew Hazard

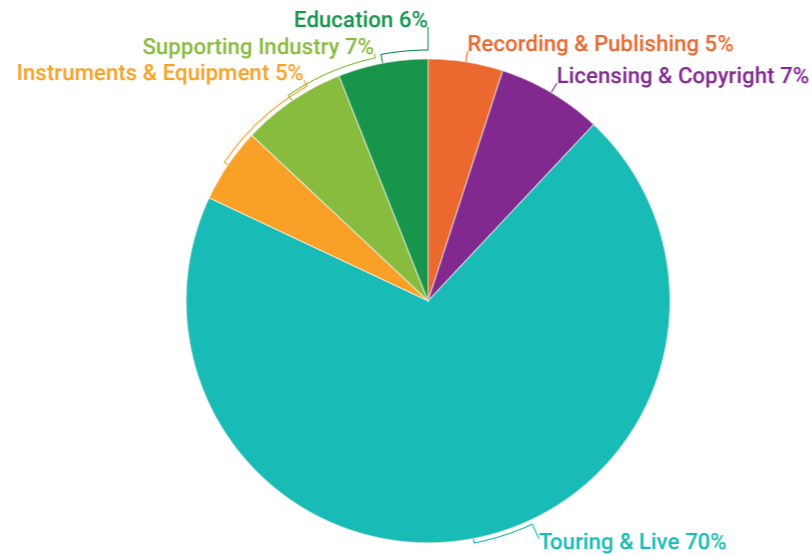
EMPLOYMENT AND ECONOMIC IMPACT

Top: Kizzy Crawford and Sinfonia Cymru. Photo: Warren Orchard
Bottom: Darkhouse Family, Sŵn. Photo: Hugh Russell

EMPLOYMENT

We found that **58%** of the jobs generated directly by the music sector are **full-time** (840) and **42% part-time** (600).

CARDIFF – MUSIC ECOSYSTEM EMPLOYMENT, 2016



INCOME/WAGES

Average annual income of artists and creative agents in the music sector is **£18,000**¹, with a varied source of income and not necessarily all from music, while **technical and management** music sector workers² earn on average **£27,500**, an average difference of **44%**³.

The total number of jobs generated and supported by the music sector in the city was **2,495**, for a total income of **£75.1 million**.

¹ Slightly below the national salary average for music creators of £20,504 (UK Music's Measuring Music 2018 report, p12)

² Technical and management music sector workers: teaching and music education professionals, audiovisual broadcasting operators, audio engineers, event promoters.

³ These estimates are based on the Annual Survey of Hours and Earnings (ASHE) and the survey carried out by Sound Diplomacy

TURNOVER

The results show that Cardiff's music ecosystem is responsible for approximately **30%** of the production and **41%** of the jobs generated by the core of the Welsh music sector.



	OUTPUT MILLION €	GVA MILLION €	WAGES MILLION €	EMPLOYEES
Direct impact	70,2	36,9	24,5	1440
Indirect impact	33,0	24,3	17,0	326
Induced Impact	50,0	43,3	33,6	729
Total	153,2	104,5	75,1	2,495

Total output **153,2 MIO GBP**

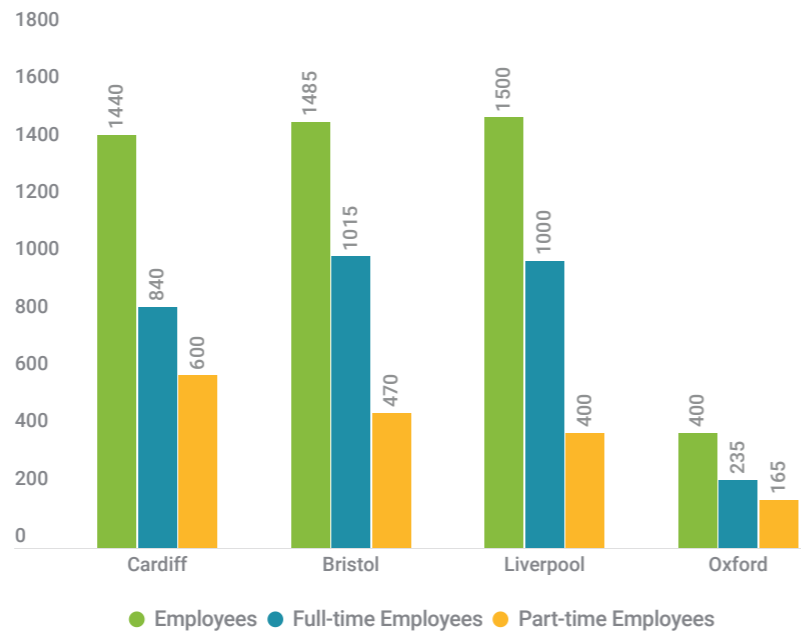
Using Standard Industrial Classification (SIC) codes, we found that **live music and touring** generated the highest output of the city's music ecosystem, producing **65%** of the total income (**£45.6 million**), and creating **70%** of the total number jobs.



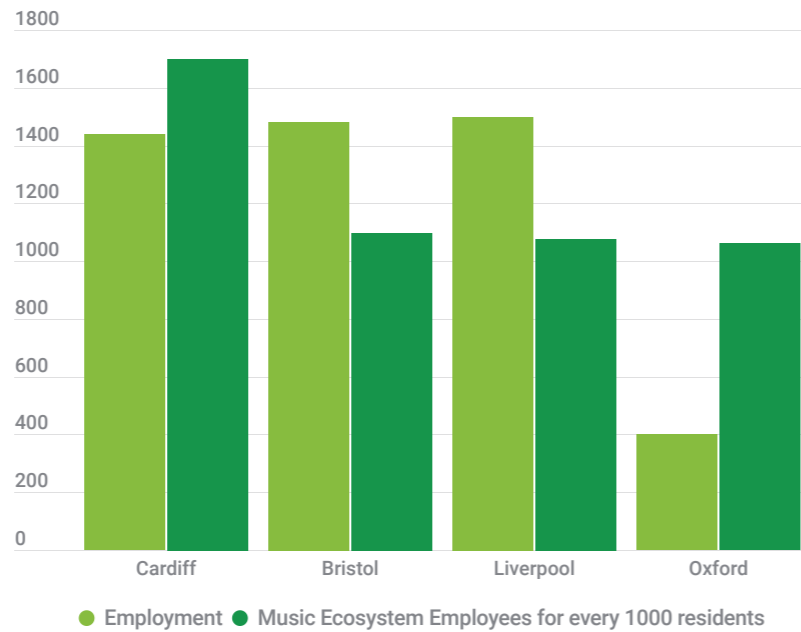
COMPARISON WITH OTHER CITIES

The number of employees working in the music sector in Cardiff is similar to those of **Bristol** (1,485) and **Liverpool** (1,500), and much greater than **Oxford** (400). However, we found that Cardiff generates **4.3 jobs in the music sector for every 1,000 residents**, while Bristol, Liverpool, and Oxford only generate **2.7**⁴.

COMPARATOR CITIES – EMPLOYMENT, 2016

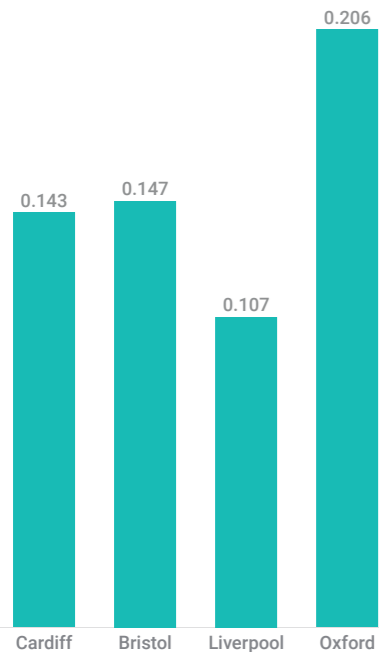


COMPARATOR CITIES – EMPLOYMENT, 2016



⁴ Demographic information obtained from the United Kingdom CENSUS 2011

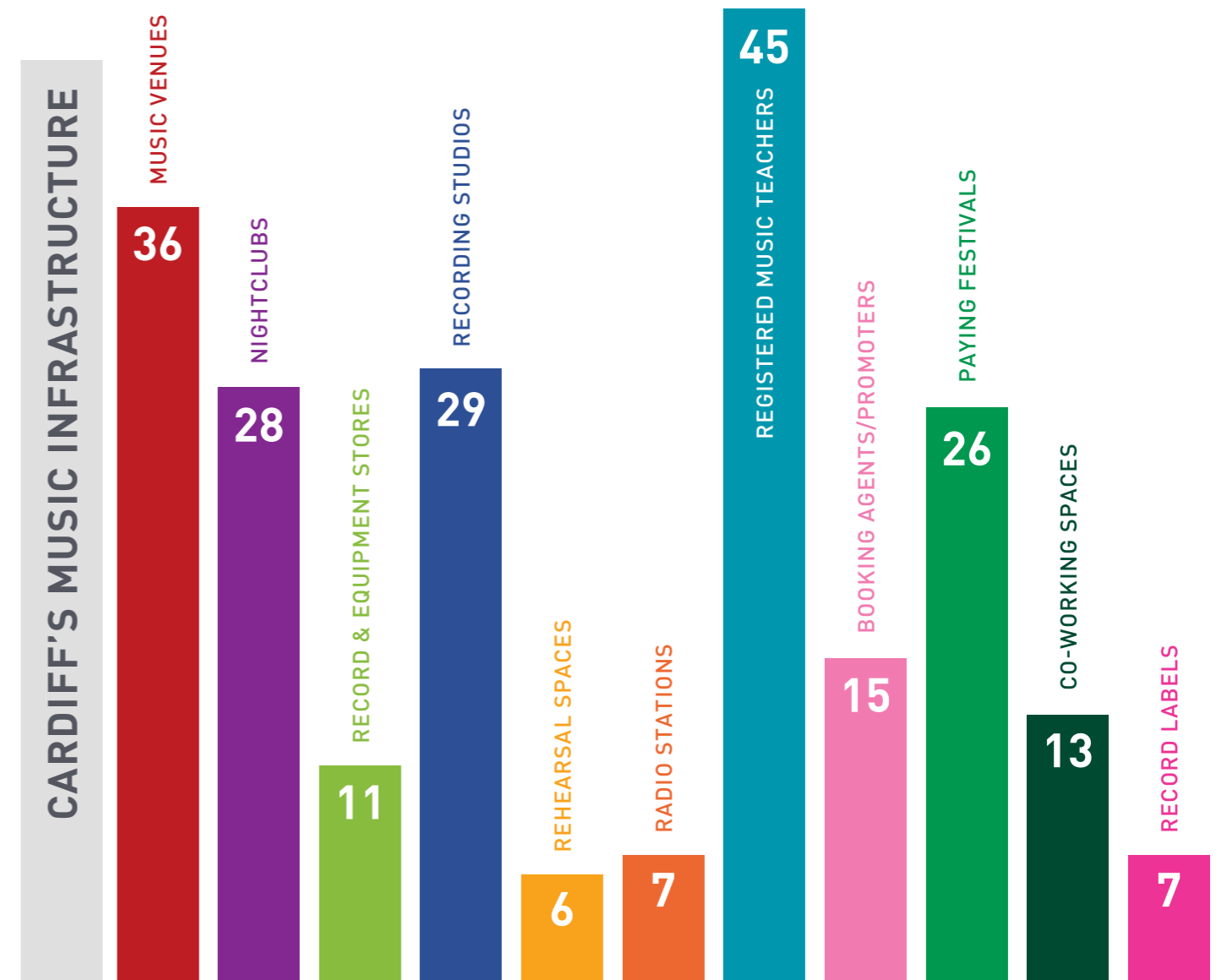
MUSIC VENUES PER 1,000 RESIDENTS



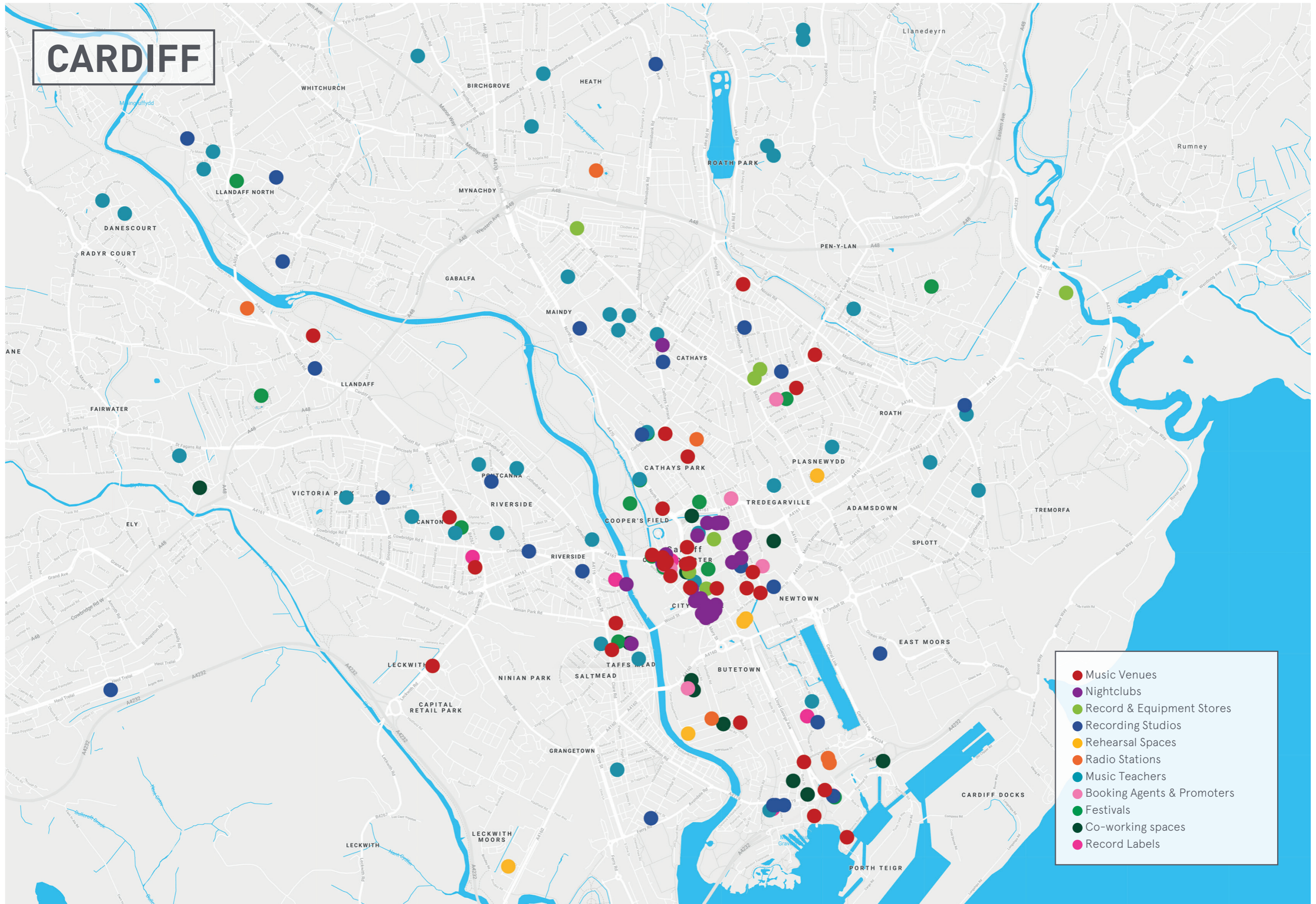
MAPPING CARDIFF'S MUSIC INDUSTRY

Using Sound Diplomacy's unique tools, we mapped Cardiff's music industry, from venues to businesses and other music assets. There are **36** music venues, **28** nightclubs, **11** record/equipment stores, **29** recording studios, **6** rehearsal spaces, **7** radio stations, **45** registered music teachers, **15** booking agents/promoters, **26** paying festivals, **13** co-working spaces and **7** record labels⁵.

⁵ Mapping information is correct as of July 10, 2018, when the data was researched. Subsequent analysis, such as venues per capita and economic outputs, was calculated using this data.



CARDIFF



- Music Venues
- Nightclubs
- Record & Equipment Stores
- Recording Studios
- Rehearsal Spaces
- Radio Stations
- Music Teachers
- Booking Agents & Promoters
- Festivals
- Co-working spaces
- Record Labels

KEY FINDINGS



St Davids Hall. Image courtesy St Davids Hall

KEY FINDINGS

GOVERNANCE & LEADERSHIP

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



LICENSING & POLICE

Many of the noise-related terms in Cardiff's licensing regulations are 'suggestions' or 'guides'. There is no financial assistance available for venues needing to improve soundproofing measures to appease noise complaints.

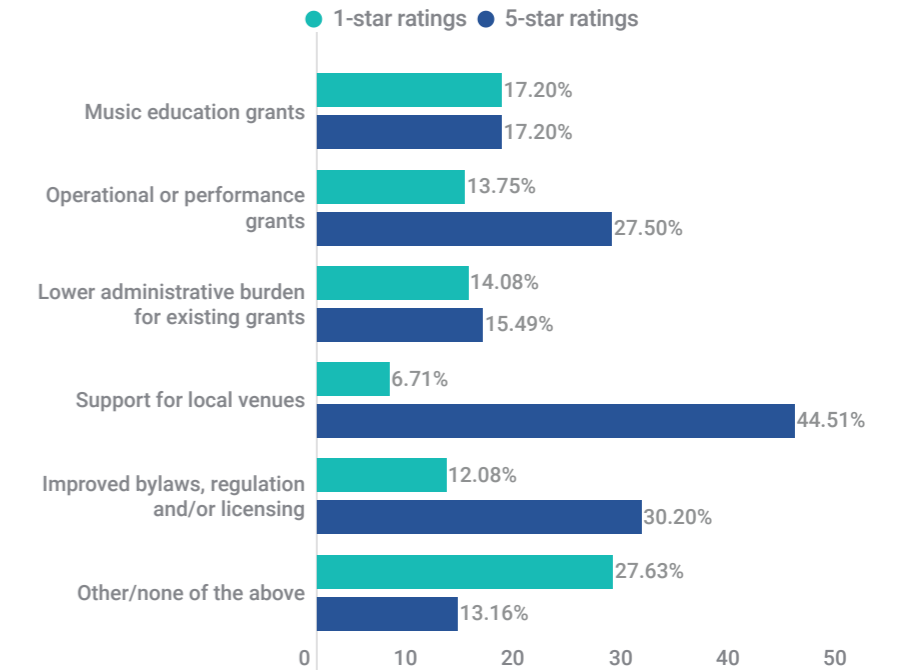
Licenses frequently restrict premises access for certain ages, or limit the hours during which music can be played. Multi-use spaces can also be assigned a single-use class to make it easier to determine licensing terms, even if the use of the venue changes during the evening (i.e. a restaurant which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

FUNDING

Core funding is currently predominantly allocated for the classical music sector, which receives generous support compared to other areas such as music education or contemporary genres. This is not surprising given the high costs associated with classical music – **it also often receives financial support from private donors and patrons,** something not commonly found in other music genres.

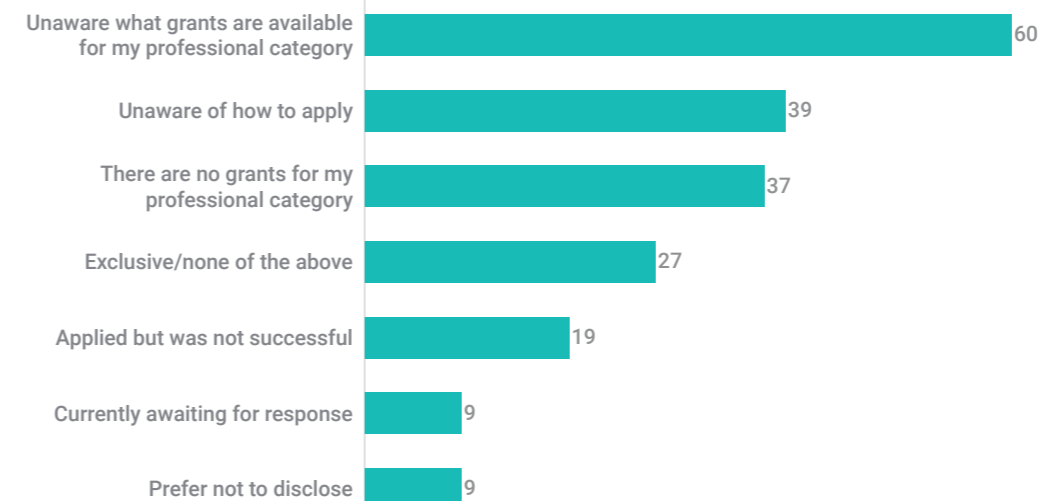
According to recent Arts Council Wales (ACW) statistics, the average % of all national large grants awarded to Cardiff was 27.2% in 2017/2018 (increasing to 37.2% for small grants of under £5K)⁶. There are opportunities to expand the allocated funding for music industry development and Welsh Government schemes to develop a specific strand for Welsh music export activities in collaboration with Wales Arts International.

RATING OF AREAS TO BENEFIT FROM INCREASED INSTITUTIONAL SUPPORT



⁶ See Arts Council of Wales (2019)

REASONS FROM RESPONDENTS WHO HAVE NEVER RECEIVED ANY GRANTS



SPACES & PLACES

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

A **lack of diversity of events and venues** is a significant issue noted by many survey respondents, particularly in terms of cultural and gender diversity. **Genres such as hip-hop, rap, grime, RnB, jazz, world music and electronic genres are under-represented,** both in terms of events and performers. Accessibility at venues, and a lack of step-free access on public transport, creates an **overall hostile environment for people with mobility restrictions who want to attend events.**



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

PLANNING

There are no policies that refer explicitly to **music venues in Cardiff's Local Development Plan, and the word 'music' is not referenced.**

District Centres prioritise **small retail or grocery stores** over leisure and entertainment facilities (the LDP states shopping should make up 75% of district centre use)⁷.

There is a tax relief scheme for the creative industries, but the only music-related use is for important orchestral venues, such as concert halls⁸. Recognition of a venue as a national heritage site is often reserved for large elite institutions, such as classical music. There are a few other informally recognised sites, such as Clwb Ifor Bach's surrounding land being purchased to protect and allow for expansion with the help of Cardiff Council and the Arts Council of Wales (ACW).

⁷ Cardiff Council (2006), pg. 181

⁸ UK Government (2018)

TRANSPORT

Long-distance train services end much earlier than Welsh services (trains to London end at 9.30pm, 9pm on Saturdays, while services to Swansea end before 2am, and before 1am on Fridays and just after midnight on Saturdays).

City trains only run until 10.30pm (11.30pm weekends) and many stations aren't accessible for people with disabilities (which also makes it difficult to transport instruments via public transport). There are only 4 night bus routes to suburban areas from the city centre, **leaving large areas unserved.** Additionally, 2 of these night buses only run Thursdays-Saturdays.



Image courtesy Cardiff County and Vale of Glamorgan Music Service

EDUCATION

The availability of **high quality music industry education was rated poorly** and there are limited options for individuals to access training that is linked to industry-demanded skills, whether it's an introduction course to music production/mixing software such as Ableton; playing a particular instrument; or beginning a traineeship in a recording studio.

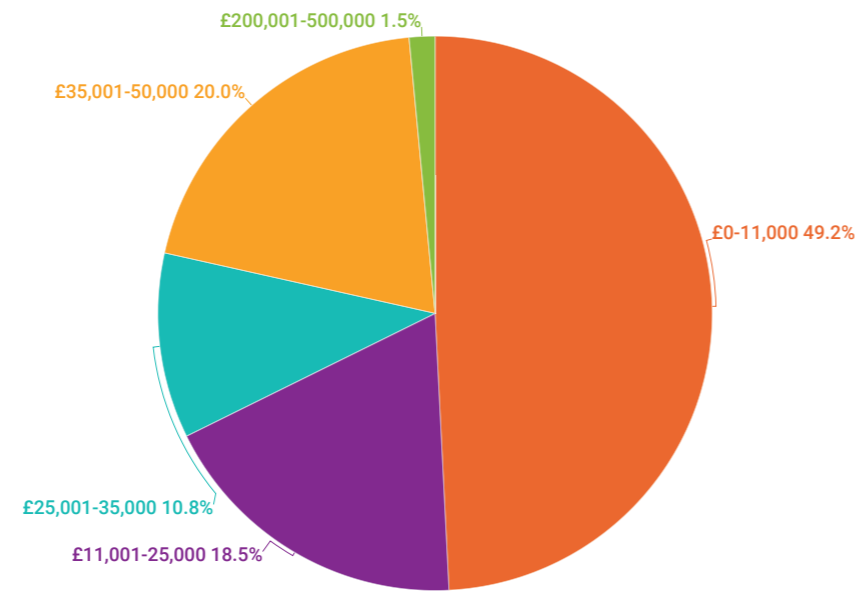
Around 56% of artists and 42% of professionals surveyed are self-trained in both the music and music industry fields, while only **about 20% studied music-related topics at university.**

EMPLOYMENT & SKILLS

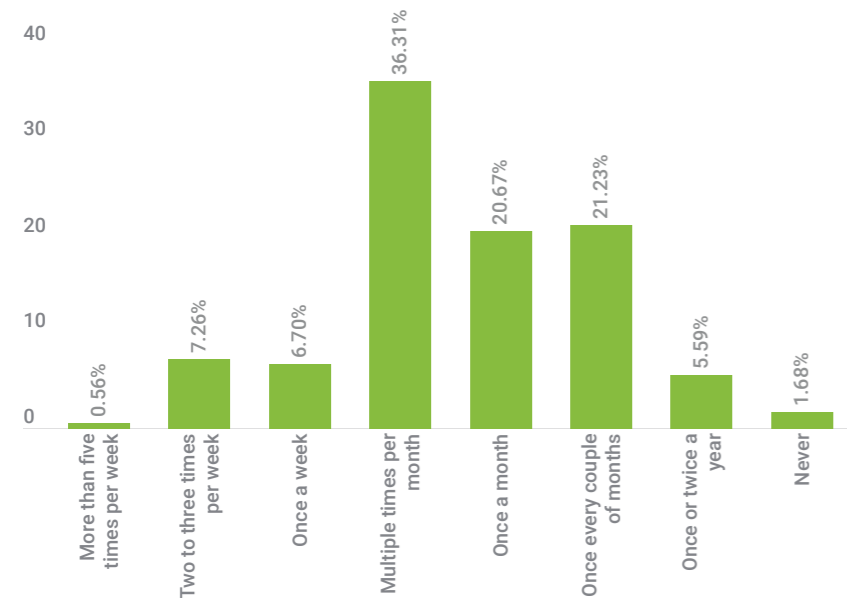
Survey insights into local artists' working patterns show that **71% work 20 hours or less in the music industry**, with 87.4% earning between £0 and £10,000 per year. **Many will supplement this income with day jobs in other industries, hindering the progress of their careers.**

There is no singular directory aggregating Cardiff's music business, professionals and resources. Compiling contact details and creating a base for the network will help bring Cardiff's music industry together.

MUSIC-RELATED INCOME OF 'PROFESSIONAL' AND 'OTHER' RESPONDENTS



FREQUENCY OF ATTENDING LIVE MUSIC RELATED EVENTS IN CARDIFF



TOURISM & BRANDING

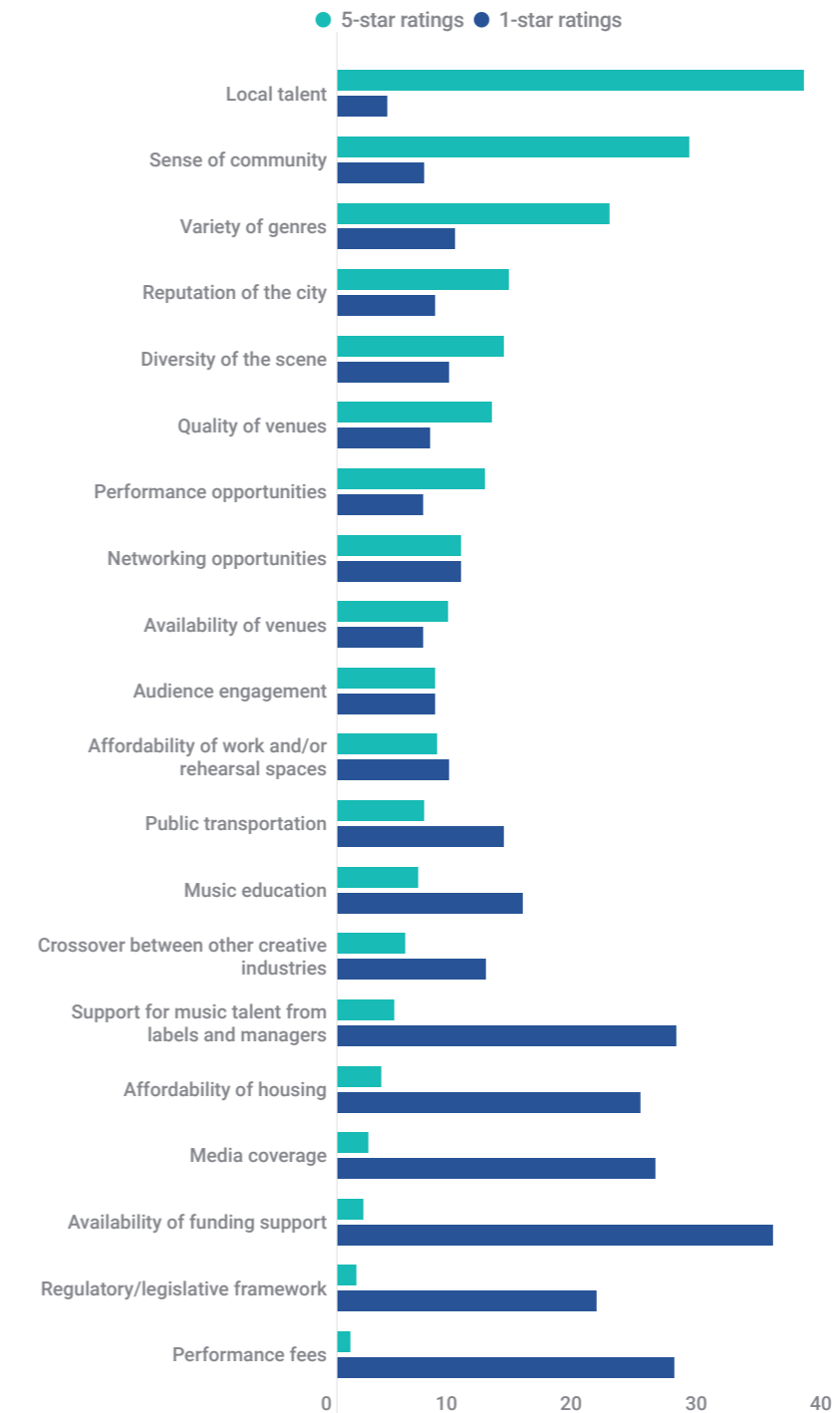
Wales has long been known as "The Land of Song". In 2017, the country generated **£115 million through music**, £55 million of which was made through live concerts and £61 million made through music festivals, and the number of **music-related jobs grew by 18%.**

75% of those surveyed attended at least one music event per month with **96%** of those saying they attended events featuring local and up-and-coming artists.

ASSETS & THREATS

Overall, the results show that Cardiff music industry professionals believe the city offers a thriving music scene with many events and good audience turnout. However, there is room for improvement. In theory, there is strong support for up-and-coming artists and a good network of professionals to help create events, although this is not effectively galvanized or communicated to those who would use it. There is a need to develop music business skills. **Funding opportunities are scarce**, and those that exist are not communicated sufficiently, **leaving musicians often unaware of what opportunities exists.**

OVERVIEW OF HIGHEST AND LOWEST RATED ASSETS IN CARDIFF'S MUSIC ECOSYSTEM



STRATEGIC RECOMMENDATIONS



Welsh National Opera. Photo: Clive Barda/ArenaPAL

STRATEGIC RECOMMENDATIONS

Each recommendation is explained and mapped out in the complete study. Below is a concise summary of our core findings.

GOVERNANCE & LEADERSHIP

MUSIC OFFICE RECOMMENDATION 1

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

PRIORITY ACTION

1.1 Appoint a Music Officer

NEXT STEPS & FURTHER ACTIONS

- 1.2 Build and maintain a business directory of the local music ecosystem
- 1.3 Develop a platform to communicate between local residents and music events.

MUSIC BOARD RECOMMENDATION 2

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

PRIORITY ACTION

2.1 Establish a Music Board

NEXT STEPS & FURTHER ACTIONS

- 2.2 Create a Cardiff Music Board Professional Organisations Sub-group
- 2.3 Create a Cardiff Music Board Venues Sub-group
- 2.4 Strengthen and further develop inter-city collaborations.

MUSIC-FRIENDLY LICENSING & POLICIES RECOMMENDATION 3

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

PRIORITY ACTION

- 3.1 Streamline permits and licenses required for music activity
- 3.2 Reassess security requirements for venues and events
- 3.3 Improve access to live music events for under-age audiences
- 3.4 Introduce Musician Loading zones for venues in city centre

NEXT STEPS & FURTHER ACTIONS

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

GRANTS & FUNDING RECOMMENDATION 4

ECONOMICALLY SUPPORT DIVERSITY IN THE CITY'S MUSIC ECOSYSTEM

PRIORITY ACTION

- 4.1 Enable a collaboration framework for funding partnerships
- 4.2 Communicate all existing funding opportunities for the Cardiff music sector in a clear, accessible channel

NEXT STEPS & FURTHER ACTIONS

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

SPACES & PLACES

ALLOCATE SPACES FOR MUSICIANS AND INDUSTRY PROFESSIONALS RECOMMENDATION 5

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

PRIORITY ACTION

5.1 Develop a Community Music Hub

NEXT STEPS & FURTHER ACTIONS

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

PLANNING, TRANSPORT, PLACEMAKING RECOMMENDATION 6

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

PRIORITY ACTION

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

NEXT STEPS & FURTHER ACTIONS

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

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

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

EDUCATION

ACCESS TO MUSIC EDUCATION AT ALL LEVELS AND AGES RECOMMENDATION 7

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

PRIORITY ACTION

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

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

NEXT STEPS & FURTHER ACTIONS

7.3 Introduce music workshops aimed at primary and secondary school students.



On Record, Cardiff Contemporary Festival. Image courtesy Freya Dooley & Cinzia Mutigli



On Record, Cardiff Contemporary Festival. Photo: Noel Dacey

PROFESSIONAL DEVELOPMENT

PROVIDE PROFESSIONAL DEVELOPMENT OPPORTUNITIES FOR THE LOCAL SECTOR RECOMMENDATION 9

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

PRIORITY ACTION

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

NEXT STEPS & FURTHER ACTIONS

9.2 Assess the creation of a Cardiff music business incubation programme.

ARTIST DEVELOPMENT

PROVIDE ARTIST DEVELOPMENT OPPORTUNITIES FOR LOCAL ARTISTS RECOMMENDATION 8

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

PRIORITY ACTION

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

8.2 Create a platform for performance development

NEXT STEPS & FURTHER ACTIONS

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



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

AUDIENCE ENGAGEMENT

RECOMMENDATION 10

EXPAND MUSIC ACTIVITIES IN CARDIFF

PRIORITY ACTION

- 10.1 Advocate for increased daytime and community music programming
- 10.2 Create a gig listing platform online that is inclusive and representative of the wider music scene in Cardiff

NEXT STEPS & FURTHER ACTIONS

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



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

MUSIC MARKETING

MUSIC CITY BRAND BUILDING RECOMMENDATION 11

BRING MUSIC STAKEHOLDERS TOGETHER TO BUILD THE CARDIFF 'MUSIC CITY' BRAND

PRIORITY ACTION

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

NEXT STEPS & FURTHER ACTIONS

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

MUSIC TOURISM ACTIVITIES RECOMMENDATION 12

CREATE A CARDIFF 'MUSIC CITY' TOURISM MARKETING STRATEGY

PRIORITY ACTION

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

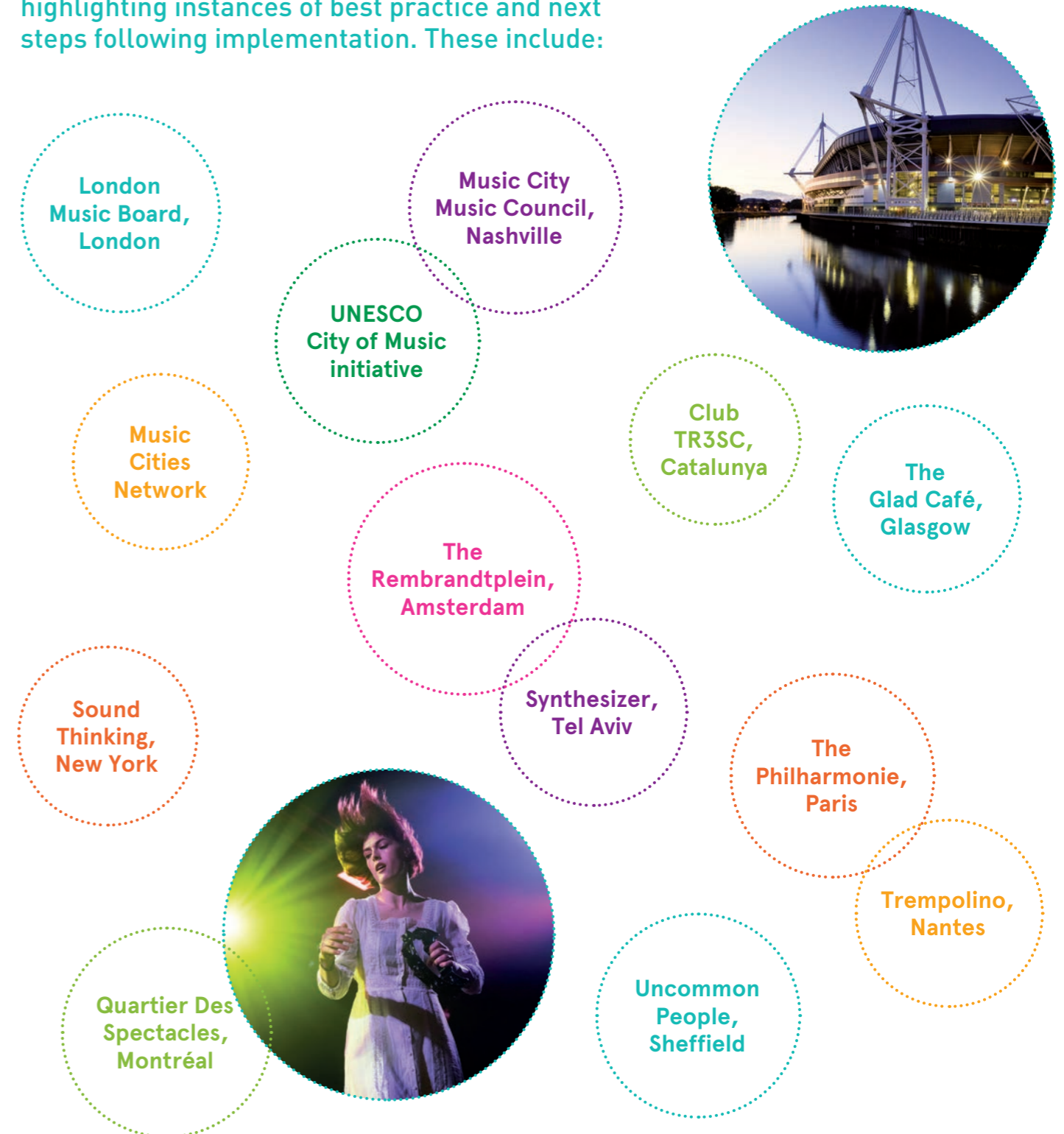
NEXT STEPS & FURTHER ACTIONS

- 12.2 Create options to engage with music tourists before and after their arrival
- 12.3 Create a music heritage tour
- 12.4 Bid to host key international music industry events
- 12.5 Explore a partnership with Bristol's Colston Hall.

CASE STUDIES AND BEST PRACTICE

Top: Principality Stadium. Photo: VisitCardiff
Bottom: Gwenvo, Swn. Photo: Simon Ayre

The strategic recommendations found in the full report contain case studies from around the world, highlighting instances of best practice and next steps following implementation. These include:



CONCLUSIONS

This study has delivered an appraisal of Cardiff's music ecosystem, and a path to harness, foster and develop it. Strengths, weaknesses, opportunities and challenges have been identified and analysed. Cardiff can proudly say it is one of the cities in the world that has invested in and developed a set of strategic recommendations to measure, value and develop the important role its music ecosystem plays in the local economy.

From this point forward, Cardiff Council, partner stakeholders and organisations will be responsible for creating and upholding policy, regulation and support that will prioritise and foster the city's music ecosystem. This will make Cardiff a city admired for it internationally. Bridging the gap between public and private sector will facilitate creatives, businesses

and communities to develop an attractive music offer that residents and visitors will want to engage in. Working together towards a safe, inclusive and sustainable music ecosystem will require hard work and commitment from all sides, but we are positive that it will bring a number of benefits to Cardiff and its residents.



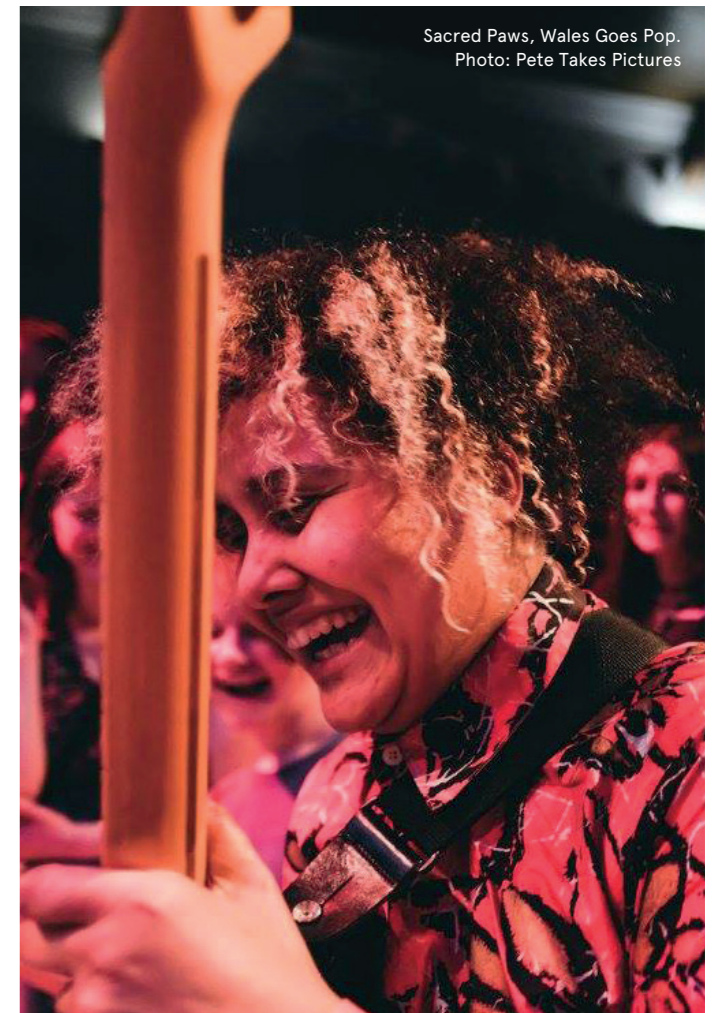
ABOUT THE AUTHORS

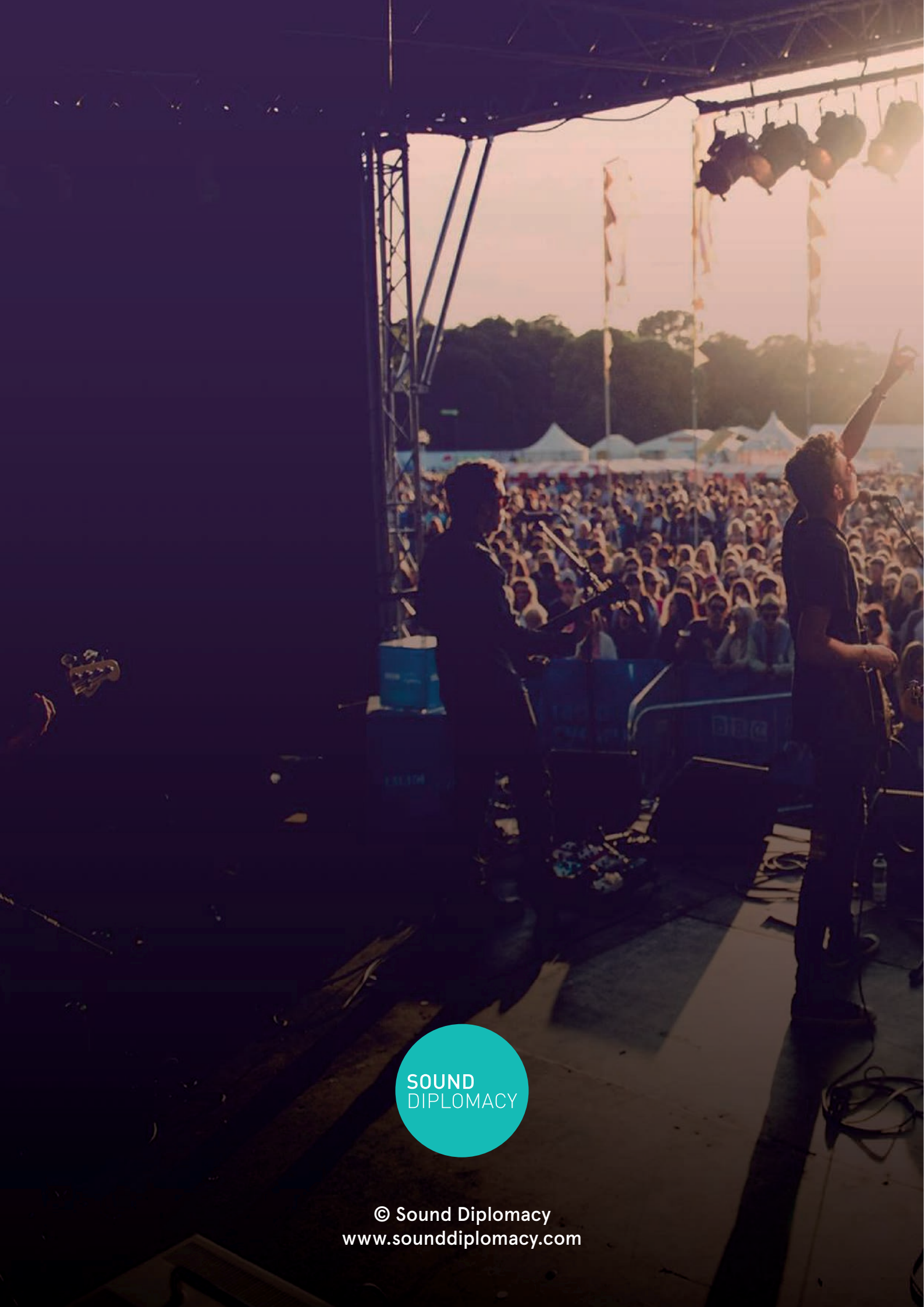


Sound Diplomacy is trusted worldwide to create and deliver strategies that increase the value of music and night time economy ecosystems.

ACKNOWLEDGEMENTS

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