



The Higher  
Education  
Academy

Arts and Humanities

# Playing Wales

the relationship between higher education and  
the live music industry in Wales

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# PLAYING WALES

The relationship between higher education  
and live music in Wales

A report for the Higher Education Academy

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## Introduction

As indicated in reports such as ‘Building New Business Strategies for the Music Industry in Wales’ (ap Siôn, *et al.*, 2009), ‘An Assessment of the Feasibility of Establishing an Independent Music Licensing and Royalty Collection Agency for Wales’ (ap Rhisiart and Owen, 2011) and ‘Investigating the Live Music Industry in Wales: A Critical Analysis’ (Carr, 2011), the value of live music to Welsh culture and its economy is significant. Live music’s importance is corroborated by statistics from the likes of Mintel (Anonymous 7, 2002),<sup>1</sup> Sunderland City Council (Debnam, 2008),<sup>2</sup> The Arts Council of Wales (Anonymous 8, 2005) and Creative and Cultural Skills (Wenham and Felton, 2011), all of who confirm its cultural and economic importance. Even taking into account the most recent calculations from the Performing Rights Society, which estimate the value of UK Live music in 2010 to be down 6.8% on the previous year (£1,430 million, from £1,589 million (Carey and Page, 2011)), the live music industry sector provides Wales with an income of around £60 million (based on a 4% share of UK total revenue), a figure which provides a foundation and great incentive for future growth.<sup>3</sup> However, any plans to exploit opportunities in live music in Wales must be implemented sympathetically and realistically. Data from Creative and Cultural Skills indicates that’s Wales constitutes only 4% of the UK employment for music as an entity, with the dominance of London (29%) and South East England (19%) not surprisingly suggesting that music tends to thrive in urban areas (Wenham and Felton, 2011). As discussed in a 2008 conference at the University of Glamorgan’s ATRiuM campus in Cardiff, (initiated in conjunction with the Sŵn Festival), live music at a local level is often dominated with rhetoric concerning how international artists have a tendency to bypass Wales when touring, something which is often connected to the lack of a mid-size venues within the capital. In a blog post discussing the conference, I asked the following questions in December 2008

- Why is it that some agents don’t feel compelled to send their artists to Wales?
- Is there a misconception that there are not enough venues in Wales?

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<sup>1</sup> Which indicated that 44% of students regularly attend live performances.

<sup>2</sup> When investigating the viability of positioning Sunderland as a “Music City”, Sunderland City Council cross-reference research from a Creative Cultural Skills baseline report which confirmed that out of the 95,000 people working in the music industry, 45% worked in live music.

<sup>3</sup> As pointed out by Dave Laing in a recent paper (Laing, 2012), when considering the “value” of live music, it is important to remember that most researchers have their own definition of what constitutes “live”. Figures such as those quoted should therefore always be considered “approximate”.

- Is there a lack of mid-sized venues in Wales? Once bands get to a certain size, can they continue to play in Wales?
- Are transport systems good enough to get people to and from Cardiff and some of the more remote venues?
- Is there a perception that Cardiff people can simply go to Bristol to see a gig?
- What is the infrastructure in Cardiff in terms of generating media coverage for bands?
- Do potential audiences feel informed in terms of what is happening in the Capital of Wales?
- Should promoters always continue to promote gigs after the venue has sold out?
- Are [some] bands in too much of a hurry to play bigger venues before they are ready?
- How could the Welsh Government help with some of these issues?

(Carr, 2008)<sup>4</sup>

Although there have been a select few reports and essays written since this post, many of these questions are still unanswered, and offer pertinent opportunities for Higher Education to explore. Written in the same year as the above mentioned blog post, an edition of the BBC South West Wales website highlights a number of issues perceived by some to be specifically relevant to West Wales, such as the lack of interest from local artists to play live, the scarcity of 'semi-big' acts performing in relatively big towns such as Swansea (which is perceived as being related to poor venue structure), the over reliance on Tribute Acts, and the importance of local community working together to make live music happen (Anonymous 1, 2008). In terms of international success, bands emerging during the *Cool Cymru* period of the mid 1990s probably best represent the peak of this musical exportation of Welsh culture, with Newport prompting one author to describe the town and its surrounding valleys as having potentially the 'world's highest concentration of young, quality rock bands' (Strauss, 1996, p. 76). A 2010 seminar in organized by the Welsh Music Foundation<sup>5</sup> starkly outlined the degree to which the once vibrant live scene in Newport has changed. This demise is probably best highlighted by the closure of TJ's, a venue that once hosted numerous local and international artists such as Catatonia, Bullet For My Valentine, The Smashing Pumpkins

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<sup>4</sup> Refer to <http://paulcarmusings.wordpress.com/2008/12/17/why-don%E2%80%99t-more-bands-come-to-wales-promoting-live-music-in-wales/> for the full blog post and an audio recording of the seminar.

<sup>5</sup> Entitled *Small City, Big Scene* and conducted on 8 July 2010 at the Meze Lounge in Newport. See [http://www.welshmusicfoundation.com/event116/2010-07-08/small\\_city\\_big\\_scene/](http://www.welshmusicfoundation.com/event116/2010-07-08/small_city_big_scene/)

and The Dammed. Reasons suggested at the seminar for this decline were wide ranging, including poor relationships between local councils, promoters and venues, inconsistent relationships between venues and national promoters, local bands omitting Newport to perform instead in Cardiff, and a perceived lack of general safety within the city. It appears that these issues need to be considered as a matter of urgency, as a vibrant local scene is an essential conduit for nurturing creativity, in addition to enabling artists to keep their intellectual property *within* the principality – a fundamental factor if the Welsh live music industry is to build on the £60 million annual turnover outlined earlier.

Issues such as this make it particularly important for the live music industry of a small, largely rural nation such as Wales to work with partners such as the Arts Council, government and the focus of this report, Higher Education, in order to identify and exploit available opportunities.

The above mentioned research by Creative and Cultural Skills also suggests that ‘there is a disparity between what is available through the formal education sector and what the music industry actually needs’, and that ‘many employers are used to the fact that the education system produces graduates without the skills they need [...] without questioning what could be done’ (Wenham and Felton, 2011, p. 19). According to an earlier report by Creative and Cultural Skills, the dominant reason for perceptions such as these by industry is not seen as being ‘qualification related’, but is simply put down to lack of experience on the part of the candidate (Anonymous 9, 2009), and this is a factor that is confirmed in some of the interviews conducted as part of this report. It is proposed that the development of a strategic symbiotic union between the live music industry and Higher Education has the potential to address many of these issues, although as indicated below, it is important not to underestimate the challenges inherent in partnerships of this nature.

This report for the Higher Education Academy builds upon a number of earlier projects I have undertaken related to the Welsh music industry. In addition to the above mentioned research for the Welsh Music Foundation, these include: ‘Development of a Foundation Degree in Music Retail Management: A Case Study Partnership between a University and Roland UK’ (Carr, 2010); ‘National Identity Versus Commerce: An Analysis of Opportunities and Limitations Within the Welsh music scene for Composers and Performing Musicians’ (Carr, 2010), and funded projects financed by the Beacons for Public Engagement (2008), The Millennium Stadium Charitable Trust (2009)<sup>6</sup> and the European Social Fund (2011), all of which have encouraged and facilitated industrial partnership, Community Engagement, Widening Participation and academic reflection on the music industry in Wales, through the medium of live music. After reviewing existing literature, this report intends to gain an initial snapshot of the ways in which music practitioners, primarily based in Wales engage with the live music industry. This will be complemented by an examination of the training that live music practitioners need, how they wish to access it, and how Higher Education, government and the music industry are, and can, address these needs.

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<sup>6</sup> See Anonymous 6 (2011) for details.

The report is subdivided into the following sections

- Methodology
- Critical Review of existing literature that is pertinent to the Welsh Music Industry
- Overview of current Higher Education Provision
- Analysis of Online Questionnaire
- Stakeholder Interviews
- Conclusions and Recommendations: How can Higher Education work more effectively with the live music industry?

## Methodology

A review of literature surrounding issues of employability, government policy and current thinking in the live music sector was initially undertaken, which was subsequently used as the basis to formulate the general structure of this report. This was accompanied by the implementation of an online questionnaire – in which a range of stakeholders in the Welsh and to a lesser extent the UK live Music Industry were asked to participate. The intention of the questionnaire was, alongside the review of literature, to obtain an initial broad understanding of the key issues surrounding employability, and the part Higher Education can potentially play in assisting the development of the live music sector of Wales. While the data from the questionnaire was assimilated, a number of face-to-face interviews with stakeholders in the live sector, from within and outside of the Welsh Music industry was arranged, ranging from organisations such as The Major Events Unit, Festival Organisers, and Higher Education providers, through to Venue Managers and portfolio practitioners who are involved in the live music industry on either a full or part-time basis. Prior to the report being finalised, it is important to note that I disseminated interim findings at two conferences during May 2012 – The ‘21<sup>st</sup> Century Musician’ conference at The University of Kingston,<sup>7</sup> and The Live Music Exchange’s, ‘Interesting Times For Local Live Music’<sup>8</sup> conference at Leeds College of Music. Discussions with colleagues at both of these events enabled feedback and suggestions to be taken into account prior to completing this report.

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<sup>7</sup> See <http://www.heacademy.ac.uk/events/detail/2012/seminars/disciplines/DW138>

<sup>8</sup> See <http://livemusicexchange.org/wp-content/uploads/Live-Music-Exchange-Leeds-programme1.pdf>

## Review of Literature

Although not *specifically* investigating how the live music industry of Wales can work with Higher Education, my earlier report, 'Investigating the Live Music Industry in Wales: A Critical Analysis' did contain a number of recommendations which are relevant to *both* Higher Education and the Welsh live music industry. An overarching finding from the report included the need for the Welsh Government to encourage more research and post-graduate study into the Welsh music industry, and although this report can be considered part of this ongoing process (although not funded by the Welsh Government), opportunities for reciprocal relationships between Higher Education and the live music industry through Knowledge Transfer Partnerships (KTPs) were identified as a potential way forward.

As outlined by Williamson *et al.* (2011), The Arts and Humanities Research Council now offer Knowledge Transfer an elevated status – making it an important target for academic research. An archetype of how a model such as this could work is encapsulated in the recent partnership between Bangor University and the largest record label in Wales – Sain Records Ltd.<sup>9</sup> With the partnership reportedly increasing the profit margins of the label by a third, in addition to “revolutionising” the industry links of the university, it is apparent that both Higher Education and live music would arguably benefit from relationships such as this. *The Live Music Exchange*<sup>10</sup> is another indicative example of a KTP which facilitates the intersection of live music and Higher Education. Funded by the Arts and Humanities Research Council (AHRC), the initiative is the final stage of a research process which will eventually result in a three-volume book series for Ashgate – investigating the history of live music in Britain between 1950 and the present day.<sup>11</sup>

As opposed to “placing” academics or students in industry, the Live Music Exchange is specifically interested in the impact agenda – with a particular emphasis on how it can obtain alternative funding sources from the music industry once AHRC finance expires. Essentially acting as a live music “Think Tank”, the initiative aims to ultimately sell its services to the live music industry; enable academics and industry practitioners to blog about current topical issues; commission its own research; and generally act as a central hub for current research activity. Most importantly, it has the capacity to act as a mediation service between various sub-sectors (for example local councils, musicians, academia, promoters, etc) – something which would be useful within the Welsh live music industry as outlined below. At the time of writing, and as a result of this current research, negotiations are underway for the next Live Music Exchange conference to take place in Cardiff, which will provide a strategic opportunity to explore further some of the issues raised in this report by encouraging academics, government and the music industry to engage in open dialogue.

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<sup>9</sup> See [http://www.ktponline.org.uk/assets/Uploads/KTP\\_SainRecords\\_4822.pdf](http://www.ktponline.org.uk/assets/Uploads/KTP_SainRecords_4822.pdf)

<sup>10</sup> See <http://livemusicexchange.org/>

<sup>11</sup> See <http://livemusicexchange.files.wordpress.com/2012/02/livemusicbookseries.pdf>

Despite the potential opportunities activities such as KTPs offer, as outlined by Williamson *et al.*, it is important to point out that research conducted *for* industry by academia can be problematic for a number of reasons – having the potential of resulting in ‘knowledge resistance’ – if the knowledge produced does not comply with specific music industry agendas (Williamson *et al.*, 2011, p. 459). This has the potential of pressuring academics to produce the *kind of knowledge* industry requires – something that does not comply with the impartiality of academic principles, in addition to compromising the ideological integrity of “impact”. As discussed in my own work with Roland UK, ‘it is important to note that the cultural differences between academia and industry can provide threats as well as opportunities to any perspective partnership’ (Carr, 2010, p. 44) – and in terms of the dialogic relationship between live music and academia, it is apparent there is still some way to go before both parties can work together, understanding each others’ traditions, while consistently complying with personal agendas.

Other potential Higher Education–Live Music interrelationships outlined in ‘Investigating the Live Music Industry in Wales: A Critical Analysis’ are too numerous to mention in detail, but include:

- the development of a (potentially accredited) music promotion programme that is specifically aimed at the Welsh sector;
- the accreditation of Kite Marking standards for music venues which are currently being developed for live music by the Musicians Union;
- a recommendation to investigate specifically how the skill shortages reported by Creative and Cultural Skills specifically impact the Welsh live music industry (the ‘UK Music Skills Audit’ undertaken by Creative and Cultural Skills and UK Music in 2010 estimated that 74% of music industry businesses report skill shortages: see Wenham and Felton, 2011, p. 20);
- a recommendation to develop alternative business models and new technologies that are specifically aimed at the Welsh live music industry (such as those implemented by profit share organisations like My Major Company<sup>12</sup> and Slice the Pie,<sup>13</sup> in addition to live music based sites such as artist tracking sites such as Songkick,<sup>14</sup> live music databases such as Superglued and “total business solutions” such as Artist Growth<sup>15</sup>);
- a recommendation to develop accredited training events which empower the Welsh live music industry with knowledge on how government decisions impact practitioner careers;

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<sup>12</sup> See <http://www.mymajorcompany.com/>

<sup>13</sup> See <http://www.slicethepie.com/>

<sup>14</sup> See <http://www.songkick.com/>

<sup>15</sup> See <https://www.artistgrowth.com/>

- a recommendation to develop training schemes that empower the live music industry with knowledge of how to take advantage of emerging funding opportunities (such as those made available by the Arts Council of Wales' Music Industry Development Fund;<sup>16</sup>
- a recommendation for Higher Education providers to assist local councils to develop training in grass route subject areas such as the 2003 Licensing Act and innovative event formation;
- a recommendation for Higher Education to explore productive interrelationships between live music and Cultural Tourism in Wales;
- a recommendation for Higher Education to investigate the reasons why Wales as a nation suffers from slow ticket sales;
- and a recommendation to explore a cost effective online ticket sales mechanism that potentially bypasses Ticketmaster.

Although these issues are very broad and may require external funding if they are to progress, they represent an example of some indicative areas that would foster productive partnerships between live music, the Welsh Government and Higher Education.

The Research mentioned above undertaken by Bangor University – *'Building New Business Strategies for the Music Industry in Wales'* (ap Siôn, et al. 2009) – has a particular focus on Welsh Language popular music, examining a range of issues such as basic industry mapping, professionalism, and the main focus of the document – the need for a Welsh Music Royalties Collection Society. The report also makes a range of recommendations specifically aligned to live music, ranging from the establishment of a live music network which is supported by 'new courses offered at HE Level' (ap Siôn, 2009, et al., p. 7), to the need for Knowledge Economy Skill PhD Scholarships (KESS), to more general live music factors such as the necessity for more 'public funding' for Welsh Language live music in particular (*Ibid.*, p. 68). This report was followed up with *An Assessment of the Feasibility of Establishing an Independent Music Licensing and Royalty Collection Agency for Wales* (ap Rhisiart and Owen, 2011), which had an overriding objective of building upon the need for a Welsh based Performing Rights Society. However, aside from comments regarding the Performing Rights Society (PRS) 'failing to police the live music scene in Wales' (*Ibid.*, p. 17) – the report does not address the live music scene specifically, or indeed Higher Education directly.

On a more global perspective, in a series of case studies analysing the portfolio careers of a range professional musicians in America, The Future of Music Coalition<sup>17</sup> offer some interesting insights into the relationships that live music has with other aspects of musicians' careers. Analysing the tax returns and when relevant royalties of a wide range of "case study" musicians (Jazz Bandleader-Composer, Indie Rock Composer-Performer,

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<sup>16</sup> See <http://www.m-magazine.co.uk/news/update-music-industry-development-fund/>

<sup>17</sup> See <http://futureofmusic.org/>

Jazz Sideman-Performer, Professional Orchestral Player and Contemporary Chamber Ensemble), the research considered live music to be an ‘essential revenue stream’, in addition to being a ‘creative choice’ (musicians enjoyed it), a ‘controllable source of income’ and a means of obtaining income that is not ‘time delayed’ (unlike recording income for example) (Dahud, 2012). The research did however regard touring in particular to have ‘significant expenses attached’, with expenditure often exceeding income, although this expenditure obviously needs to be contextualised against the additional income streams that touring facilities. Selling CDs at concerts is one such example, with the “Indie Rock Performer” case study making 22% of their income via this source alone (*Ibid.*).

Regarding the current imperative of the music industry’s emphasis on the importance of developing “alternative business models”, a number of opportunities currently exist that offer financial incentives for both the music industry practitioner and Higher Education – independently and collectively. Live Nation’s recent initiation of their LN Labs Fund<sup>18</sup> is part of what Rolling Stone described as ‘their aggressive expansion into music start-ups’ (Raymundo, 2012). Having recently acquiring media measurement company Big Champagne<sup>19</sup> and concert set list aggregator Setlist FM,<sup>20</sup> the LM Labs Fund is depicted as ‘funding great new products that further engage fans and enrich the concert experience’ (*Ibid.*). LN Labs Vice President Ethan Kaplin has stated that the organisation are interested in ‘facilitating customers to connect to their ‘favourite music and events in the world’ (Houghton, 2012) and through the fund are currently investigating a mobile app (Laminate Mobile) that provides users with practical information regarding negotiating the myriad of artists and bands at specific music festivals.<sup>21</sup>

In 2010, Welsh businesses were considered to be behind the UK average regarding web based visibility (Anonymous 3, 2010), a factor that resulted in a 2012 partnership between the Welsh Government and Google, with a primary focus of encouraging and facilitating Welsh businesses to sell goods and services online (Anonymous 2, 2012). Although this initiative is not specifically targeted at the live music industry, it is another example of available finance, through which entrepreneurs in the Welsh industry can potentially work with a global company to reach new markets.

As indicated in my earlier report ‘Investigating The Music Industry in Wales: A Critical Analysis’, the Welsh live music industry’s integration with initiatives such as these could range from the exploration of a cost effective online ticket sales mechanism that at least partially bypasses Ticketmaster,<sup>22</sup> to the development of new technologies that are specifically aimed at the Welsh live music industry. At the time of writing a Welsh artist

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<sup>18</sup> See <http://www.livenationlabs.com/>

<sup>19</sup> <http://bcdash.bigchampagne.com/who>

<sup>20</sup> See <http://www.setlist.fm/>

<sup>21</sup> See <http://www.laminate.tkyo.co.uk/about-us/>

<sup>22</sup> See <http://www.ticketmaster.co.uk/>

based crowd sourced funding model similar to Slice the Pie, or a artist tracking site like Songkick seems a logical start, as this would make at least a small contribution toward ensuring monies generated from live music remain within the Welsh economy, in addition to ensuring audiences are aware of the live music taking place throughout Wales.

The current development of the Skills Action Plan by the Major Events Unit (in conjunction with Creative and Cultural Skills) is an example of an initiative that would benefit with intervention from music expertise in Higher Education. Recognising the lucrative relationship of major events and cultural tourism, the objectives of the forthcoming Skills Action Plan is to address the skill gaps identified by Creative and Cultural Skills, in addition to prohibiting the flow of graduates across the border. A workshop organised by the Major Events Unit on November 17<sup>th</sup> 2011, lists Events Management courses in Wales at the universities of Swansea, Glamorgan, Glyndwr and UWIC, although it is interesting to note that none have a *specific music industry focus*. It is proposed that this offers a strategic opportunity for Higher Education providers in Wales. A brief report of the workshop also outlines the importance of graduates being able to undertake a 'range of functions' (Anonymous 11, 2011), something which is congruent to the *portfolio career* outlined earlier that most modern day music practitioners have to undertake in order to make a sustainable living. Additionally, the report also reiterates the need for schools, Further and Higher Education to 'rebalance' their curriculum, based on 'real needs and opportunities' (*Ibid*).

Regarding live music industry mapping, it is apparent that Wales at present falls somewhat behind a number of other Small Nations. For example, although not all are conducted by university departments, many Small Nations have already conducted mapping exercises into their respective music industries. Examples include: Denmark (Lorenzen and Frederikson, date unconfirmed), Trinidad and Tobago (Henry, date unconfirmed), Senegal (Pratt, 2004), Scotland (Williamson, Cloonan, Frith 2003) and the regional North West of England (Burns Owens Partnership, 2006). Although these mapping exercises include research into the music industry as an entity as opposed to the sub-sector of live music, they serve as useful indicative examples of how the Welsh industry, government, the Arts Council of Wales with the assistance of Higher Education, could conduct research into live music.

When making a specific comparison between Wales and Scotland, it is apparent that there are numerous examples of academics such as Martin Cloonan and Simon Frith having a long standing relationship with not only music industry based research (For example Williamson, Cloonan, Frith, 2003, Frith, 2000) but also specific investigations into live music (for example Williamson and Cloonan, 2007, Cloonan, 2007, Anonymous 10, 2005). Cloonan and Frith are also the driving forces behind the Live Music Exchange KTP mentioned earlier, and it seems pertinent to suggest that their expertise be used to input into academic/live music partnerships in Wales.

On the subject of purely academic research into the music industry of other Small Nations, it is apparent that Wales could potentially benefit from the stance of nations such as Canada, whose radio and television content regulations have since 1971, aimed to 'increase the amount of high-quality Canadian talent' (Henderson, 2008, p. 308). With radio play authorities currently stipulating that 35% of content must be of Canadian origin, Henderson outlines how this policy (which is also implemented by nations such as France and Australia) has facilitated Canadian bands to be 'an accepted part of the music scene for contemporary Canadian youth', with the 'policies that have been put in place [...] been successful in constructing an emerging Canadian popular music industry' (*Ibid.*, p. 314).

The importance of local music gaining a presence on radio is also outlined by Shuker (2008) when discussing the progressive development of the music industry in New Zealand, with a 1986 report by the Royal Commission into Broadcasting and Related Telecommunications in New Zealand recommending 'a quota of 10 per cent of music composed, arranged, performed or recorded and produced by New Zealand citizens or residents on radio' (Shuker, 2008, p. 273). Although this proposal was subsequently rejected, the emergence of New Zealand On Air (NZOA) in 1991 used the annual broadcasting fees from television and radio licences to finance localised media and culture – including music. Although not directly related to live music, a subsidy for local videos in the early 1990s was seen to have a 'snowball effect' (Shuker, 2008, p. 275), where television play led to record sales, which led to local music being placed on radio play lists, 'leading to more sales and higher chart listing [for New Zealand artists] through the 1990s' (*Ibid.*). Although Shuker does not include it in his essay, this initiative must have been productive for live music due to the symbiotic relationship the sector has with radio and record sales. However, (as in Wales), the small nation demographic in New Zealand still makes it difficult to make a living as a full-time professional performer, a factor which resulted in New Zealand artists 'who stayed at home' remaining 'marginal to the international music industry' (*Ibid.*, 276).

As reported in an essay outlined earlier that investigated how bands such as Super Furry Animals and Gorky's Zygotic Minci often have to compromise their Welsh Identity when seeking international success (Carr, 2010), the political tensions between local and global "acceptance" are often problematic – and in the case of New Zealand, their premier band of the 1990s, Shihad, had to relocate to Los Angeles in order to exploit international opportunities (they are now based in Melbourne, Australia) (Shuker, 2008). This type of "internationalisation", particularly when accompanied with the decision to sing in English as opposed to Welsh, is often problematic in Wales, with singer songwriter Twm Morys commenting on the Super Furry Animals' decision to sing in English: 'they are a very, very fine band. As musicians I have nothing but admiration for them. But I cannot accept that they are a Welsh band (Morys in Llewellyn, 2000, p. 329). Recognising this type of tension between cultural authenticity and international exposure, the new Labour Government in New Zealand decided to double the financial support given to NZOA, with the then broadcasting minister Marion Hobbs stating

*The bottom line is that we have a growing number of New Zealand musicians who need a boost from their own country before they hit the world market. Without a local quota, New Zealand musicians have to make it on the world market before they are heard by their own compatriots. (Hobbs, quoted in Shuker, 2008, p. 277)*

This resulted in “strongly encouraged” *local content quotas* of 13% in 2002 (with the implicit threat of licences not being renewed), rising to a projected 20% in 2006.<sup>23</sup> According to Shuker

*[...] these various initiatives played an important role in stimulating the local music industry, with higher chart profiles for New Zealand music. Auckland group Nesian Mystik’ Polyunsaturated was No. 4 on the top 50 album list for 2002, and singer-songwriter Bic Runga’s Beautiful Collision was the biggest-selling album in New Zealand in 2003. (Shuker, 2008, p. 279)*

Despite that fact that by 2005, indigenous ‘New Zealand Music accounted for 20.8% of music played on commercial radio’ with overseas earnings estimated at over five million (NZ\$) a year (*Ibid.*, p. 279), as with Wales, some commentators were still uncomfortable with the tension between commercial success and the compromise of (what some perceive as) cultural identity. This balance, of the local and global is complex, and in the case of the New Zealand government, a sensible balance seems to have been obtained. To quote Shuker: ‘[w]hile supporting local culture and identity’, there is now ‘a more pragmatic concern for the economic value of the industry’ (*Ibid.*, p. 282). It is proposed that if the Welsh music industry is to get to this point and seriously exploit *economic opportunities*, the definition of what constitutes “Welsh Music” needs to be (re)redefined. At present, authors such as Llewellyn (2000), Ap Rhisiart and Owen (2011) and ap Siôn (2009) regard the *Welsh Language* as the dominant factor in Welsh music, and although its absolute importance is unquestionable when considering Welsh culture, it is suggested a more encompassing perspective of what it means to be “Welsh” is essential when considering the *economic* propagation of the Welsh popular music industry.

In the case of New Zealand, in order to obtain funding, supported music must be *made in the country* and preferably be *original* (although cover versions of original New Zealand music are accepted). Financially supported music also needs to have a confirmed record release, with any support for video depending on its strategic relationship to a single or album. Priority is given to music that is released nationally, and if a similar policy was adopted in Wales, this would need to include dissemination to English *and* Welsh parts of the industry. Finally, the release must be capable of attracting ‘significant airplay on Commercial Radio’ (Shuker, 2008, p. 278), and as outlined by ap Rhisiart and Owen (2011), this is problematic in Wales, in particular for Welsh Language musicians. The authors outline how Performing Rights Society income in Wales had decreased from £1.6 million in 2007 to £267,000 in July 2010 and suggest that this concerning

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<sup>23</sup> As outlined below, this target was actually exceeded.

reduction is not from live music, but a direct result of the ways in which the Performing Rights Society have readjusted their income formulas for *Radio Cymru* (the national station for Welsh language music), which no longer receives the income stream of a “national” station, but, according to the study, is now in a similar financial bracket to Radio Norfolk and Radio Shropshire.

According to Mäkelä, recent export success of Finnish popular music is a direct result of a ‘reconfiguration of the state music policy’ (Mäkelä, 2008, p. 257), something that arguably needs to occur in Wales if the live music industry is to be financially sustainable. The Finnish government currently offers a range of subsidies to the music industry, ranging from the sponsoring of performers, assistance with recording costs, to video production and touring assistance. Like Finland, Wales’ current position resonates with the three types of nation state policy Mäkelä outlines – that of Authoritarian (the State strongly controls record production, licensing of live music and music imports), Benign (The State leaves popular music open to the free market) and Promotional (the State devises policies to strictly control the dominance of Anglo-American dominance) (Mäkelä, 2008). However, the music industry in Wales must be careful not to emphasise its ‘promotional’ tendencies, by using music to ‘combat the dominance of Anglo-American music’ (Mäkelä 2008, p. 258). As I outlined in an earlier article, ‘great care must be taken to ensure the government does not straddle the authoritarian divide regarding language, as this [has the potential to] negatively impact employment opportunities for musicians and the industry at large by placing emphasis on cultural as opposed to financial factors’ (Carr, 2010, p. 280). Both financial stability and cultural authenticity are important, and the Welsh music industry as an entity has some way to go before a balance is achieved that pleases all parties.

## A Snapshot of Current UK Courses with a Live Music Focus

When examining the UCAS/UKPASS (for post-graduate) websites and/or Google with the keywords “Live Music”, “BA Live Music Production” and “Masters Live Music” –the following courses appear – that are related and relevant to this report.

**Figure 1 A Snapshot of Current HE Courses Related to Live Music**

University/College	Course
Bedford College	HND in Live Event Production
University of Bolton	FD in Live Events Production
Buckingham New University	BA (Hons) in Music and Live Events Management
Buckingham New University	BA (Hons) in Event and Festival Management
University of Central Lancashire	BSc (Hons) in Music and Live Music Production
University of Derby	FYR in Sound, in Light and Live Event Technology
University of Derby	BSc in Sound, in Light and Live Event Technology
The Manchester College	FD in Technical Events Management
Newcastle College	FD in Live Music and Theatre Production
Northumbria University	MA in Music Management and Promotion
Plymouth University	FD in Live Sound
Southampton Solent University	BA (Hons) in Live and Studio Sound
Southampton Solent University	BA (Hons) in Music Promotion (From 2013)
Southampton Solent University	MA Music Festivals (From 2013)
South Essex College of Further and Higher Education	FD in Production for Live Performance and Events
Stratford upon Avon College	HND in Technical Theatre and Live Events Production
University of the Arts London	One year top up – Production for Live Events and Television
UCP Marjon - University College Plymouth	FD in Live Sound
UCP Marjon - University College Plymouth	BA in Live Music (Accelerated)

It is interesting to note that the majority of these programmes are not based in music departments, indicating that students interested in courses of this type may not be “musicians” in the traditional sense. However, there does appear to be opportunities for music departments to engage more overtly with live music – in particularly the interrelationship between performance skills and event management – factors that are often particularly important at the start of musicians’ careers. There are currently no *specifically* live music related awards in Wales, aside from the generic “Events Management” programmes indicated earlier.

The University of Bolton's accelerated 15 month FDA in Live Events Production<sup>24</sup> in partnership with The Backstage Academy<sup>25</sup> represents an interesting example of the union of a university partnering with a private sector organisation – which has a specific focus on live music. Based in the industry-centred LS Live facility (which focuses on offering purpose built rehearsal facilities, event staging, set construction and equipment hire to the music industry) in Wakefield,<sup>26</sup> The Backstage Academy was initiated in 2009, with a particular focus on addressing the issues associated with the projected growth in the live music sector forecast by Creative and Cultural Skills, in addition to the anticipated skill shortfalls outlined above.

If implemented correctly, this type of partnership has the benefit of ensuring students receive relevant work placements, industry contacts, in addition to mentoring from practitioners working in the live music industry sector. As outlined in reports conducted by John Brown ('Securing a Sustainable Future For Higher Education: An Independent Review of Higher Education Funding and Finance', 2010), Tim Wilson ('A Review of Business-University Collaboration', 2012) and a recent government White Paper (Cable and Willetts, 'Higher Education: Students at the Heart of the System', 2011), it also appears to be a governmental strategic objective to not only facilitate private organisations to partner academic institutions, but to enable them validate and teach *their own degrees*: to quote the White Paper mentioned above

*We will remove the regulatory barriers that are preventing a level playing field for higher education providers of all types, including further education colleges and other alternative providers [my emphasis]. (Cable and Willetts, p. 5).*

The paper continues to outline how the government intends to 'further improve student choice by supporting a more diverse sector' (*Ibid.*), essentially offering more opportunities for part-time, what it describes as "accelerated" courses (as in the 15 month FD at the University of Bolton), sandwich courses, distance learning and higher-level vocational study. When specifically discussing "alternative providers", the White Paper states

*We will make it easier for new providers to enter the sector. We will simplify the regime for obtaining and renewing degree-awarding powers so that it is proportionate in all cases. We will review the use of the title 'university' so there are no artificial barriers against smaller institutions. [...] We will once more decouple degree-awarding powers from teaching in order to facilitate externally-assessed degrees by trusted awarding bodies (*Ibid.*, pp. 5–6)*

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<sup>24</sup> See <http://www2.bolton.ac.uk/coursefinder/DisplayCourse.aspx?ProgId=907dac7a-5659-4851-89f8-173821495aa2>

<sup>25</sup> See <http://www.backstage-academy.co.uk/>

<sup>26</sup> See <http://www.ls-live.com/>

Although these policies have not reached fruition as of yet, according to a 1–7 March 2012 edition of Times Higher Education (Morgan, 2012), seven private institutions obtained more than £1 million in fees and maintenance loans in the 2010–11 academic year. Interestingly, two of these were music based: with the Brighton Institute of Modern Music (BIMM) turning over £4.9 million, closely followed by the Academy of Contemporary Music (ACM) at £4.4 Million, it seems logical to suggest that private organisations, either independently or in partnership with the university sector, are set to increase in number, and if conducted sympathetically, this could have a positive impact on live music education in Wales.

In terms of course content, a number of other programmes in the sample had a similar technological focus to the FDA at the University of Bolton – namely the awards at Bedford College,<sup>27</sup> the University of Derby,<sup>28</sup> The Manchester College,<sup>29</sup> South Essex College of Further and Higher Education,<sup>30</sup> and Stratford Upon Avon College.<sup>31</sup> There are also courses, such as the Foundation Degree in Live Music and Theatre Production at Newcastle College,<sup>32</sup> that teaches the technical side, but also appears to place an emphasis on generic stage management skills, although as the title suggests, these are geared toward theatre as opposed to the music industry. The only course that overtly focuses on music promotion was found at Southampton Solent University.<sup>33</sup> As the course does not commence until 2013, there is no track record to decipher student demand, although this award looks like it was validated as part of a pair, with the MA Music Festivals programme also commencing the same year. Considering the opportunities for music (in particularly Festival based) promotion being made apparent by the Welsh Government’s Major Events Unit and the Arts Council for Wales’ Music Development Fund, courses of this type could be of strategic importance to the Welsh music industry.

Southampton Solent University also implements a “live sound” degree,<sup>34</sup> although a particularly interesting example of live sound teaching is evidenced in the partnership between University College Marjon, The University of Plymouth and private provider

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<sup>27</sup> See [http://www.bedford.ac.uk/our\\_courses.aspx?id=116126&mode=F](http://www.bedford.ac.uk/our_courses.aspx?id=116126&mode=F)

<sup>28</sup> See <http://www.derby.ac.uk/sound-light-and-live-event-technology-bsc-hons>

<sup>29</sup> See <http://www.themanchestercollege.ac.uk/university-degree-level/courses/event-management>

<sup>30</sup> See <http://www.southessex.ac.uk/courses/detail.aspx?id=2487&t=2&ca=14&cps=southend>

<sup>31</sup> See <http://www.stratford.ac.uk/Courses/CourseRecord.aspx?recordid=1324>

<sup>32</sup> See <http://www.ncl-coll.ac.uk/course-pdf-print.aspx?courseid=12337&-O=Portrait>

<sup>33</sup> The BA (Hons) Music Promotion. See

[http://www.solent.ac.uk/courses/undergraduate/music\\_promotion\\_ba/course\\_details.aspx](http://www.solent.ac.uk/courses/undergraduate/music_promotion_ba/course_details.aspx)

<sup>33</sup> See <http://infxonline.blogspot.co.uk/>

<sup>34</sup> The BSc (Hons) in Live and Studio Sound. See

[http://www.solent.ac.uk/courses/undergraduate/live\\_and\\_studio\\_sound\\_bsc/course\\_details.aspx](http://www.solent.ac.uk/courses/undergraduate/live_and_studio_sound_bsc/course_details.aspx)

Deep Blue Sound.<sup>35</sup> As with The Backstage Academy in Wakefield, the Foundation Degree in Live Sound<sup>36</sup> takes place in a purpose built premises, in this case a 500 capacity venue, and is validated by the University of Plymouth. Overtly stating that its faculties are not a ‘standard university campus’, but a ‘learning community dedicated to the creation of music and sound’, the course appears to boldly state its vocational focus. This award is partnered with the University College Marjon validated BA in Live Music.<sup>37</sup> Claiming to focus on a wider breadth of areas related to live music (such as composition, lighting, event design, etc) the award is already incorporating (like The Backstage Academy) one of the “flexible approaches” to Higher Education outlined in the White Paper mentioned above – a 2 year degree. It is also interesting to note that Deep Blue Sound is partnering two Higher Education institutions – possibly a sign of the attraction of organisations such as this?

The importance of industry liaison is also apparent in the programmes developed by

Buckingham New University – the BA (Hons) in Music and Live Events Management and BA(hons) in Event and Festival Management awards. Although not delivered on purpose built industry facilities like The Backstage Academy or Deep Blue Sound, the BA (Hons) in Music and Live Events Management is *developed in partnership* with industry (Sennheiser, Shuttlesound and AC Lighting are mentioned in the prospectus) and is specifically aimed at a range of live music roles such as Tour Manager, Festival Organiser, Promoter and Stage Manager. Subject areas range from Event Theory, Marketing, Intellectual Property, Management Principles and Entrepreneurship, and the qualification is associated with its own production company - INFX Live.<sup>38</sup> As opposed to an overt industry link, the BA(Hons) in Event and Festival Management is supported by its own Research Centre – the International Centre for Crowd Management and Security Studies,<sup>39</sup> with its leader, Professor Keith Still recently offering advice on crowd management to the South by South West Festival in Austin, Texas (Anonymous 4, 2011). An earlier research project carried out by the Centre concerned a survey of “Green Issues” at live music events in Europe (Anonymous 5, 2012), a project commissioned by industry, with research partially undertaken by undergraduate students.

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<sup>35</sup> See <http://dbsmusic.co.uk/about-us/>

<sup>36</sup> See <http://dbsmusic.co.uk/fda-live-sound/>

<sup>37</sup> See <http://dbsmusic.co.uk/ba-hons-live-music/>

<sup>38</sup> Although the web site does not seem to have been updated for a while. See <http://infxonline.blogspot.co.uk/>

<sup>39</sup> See <http://www.crowdsafetymanagement.co.uk/>

Taught Post-Graduate provision specifically targeted toward live music is at present very sparse. Indeed aside from the MA Music Festivals commencing at Southampton Solent in 2013, no other courses were found.<sup>40</sup> Interestingly, when searching UKPASS with the key terms “Music Production”, a number of engineering based courses emerged, although these courses appear to be targeted at recorded, as opposed to live music. More investigation is required in order to ascertain why this is the case, but considering the emergence of live music’s dominant market position over the last several years, it does appear that post-graduate provision specifically related to live music does not reflect industry trends.

## Analysis of the Online Questionnaire

Research conducted by The Future of Music Coalition indicated that most musicians in America today undertake *portfolio* careers. Indeed when questioning 5371 artists, this research indicated that more than 50% of the sample found themselves ‘juggling three or more roles’, with nearly ‘26% of artists undertaking 4 or more’ (Resnikoff, 2012). Although the sample of this investigation is far smaller (64 respondents), it is apparent that many people involved in the Welsh live music scene follow a similar pattern, undertaking on average two or more roles. Artists can be seen to be combining their roles as musicians (which includes band work – playing both original and “cover” material) with areas such as Management, Marketing, Venue Management, Sound Engineering, Training Provider/Educator, Sound Production, Community Musician, Promoter and Instrumental Tuition. Although not necessarily directly related to *music making*, live *music practitioners* can also be seen to undertake activities such as Equipment Hire, Booking Agency, Engineering, Live Concert Recording, Music Effects for Film, Music Journalism, Studio Owner/Management and Tour Management. Some musicians can also be seen to be performing in more than one band, which provides not only artistic satisfaction, but in the current financial climate, increased work opportunities.

As can be seen from figure 2 below, the majority of live music practitioners in the sample consider themselves to be “Artists”, followed by “Promoter” and “Training Provider”. The combination of “Artist and Promoter” as the dominant roles is congruent to the recent research carried out for the Welsh Music Foundation (Carr, 2011), and arguably indicates the implicit need for musicians today to be able to promote their own music – in particularly in the early stages of their career. As stated in the snapshot of course provision above, it therefore makes sense for Higher Education institutions to consider combining these activities in course provision.

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<sup>40</sup> Northumbria University’s MA in Music Management and Promotion touches on the subject matter of live music, although the content of this award does not seem to be directly related to the skills that practitioners require in the live music industry – see

<http://www.northumbria.ac.uk/?view=CourseDetail&code=DTFMMP6>

**Figure 2: Overview of Live Music Roles**

Section 1: Introductory Questions for Everyone

1. What area(s) of the live music industry do you or your company mainly work in? Tick as many boxes as necessary.

Live Music Venue:	<input checked="" type="checkbox"/>	n/a	20
Booking Agent:	<input type="checkbox"/>	n/a	10
Promoter:	<input checked="" type="checkbox"/>	n/a	26
Artist Management:	<input type="checkbox"/>	n/a	13
Artist:	<input checked="" type="checkbox"/>	n/a	34
Marketing:	<input type="checkbox"/>	n/a	11
Sound Engineer:	<input type="checkbox"/>	n/a	16
Rehearsal Studio:	<input type="checkbox"/>	n/a	2
Government Body:	<input type="checkbox"/>	n/a	0
Sound Production:	<input type="checkbox"/>	n/a	11
PA Hire:	<input type="checkbox"/>	n/a	5
Education/Training Provider:	<input checked="" type="checkbox"/>	n/a	20
Other (please specify):	<input type="checkbox"/>	n/a	5
Other (please specify):	<input type="checkbox"/>	n/a	13

As indicated in the Figure 3, the majority of the sample (61%) can be considered “experienced”, having been involved in the music industry (to some degree) for ten years or more. It was however gratifying to see some representation from younger/less experienced practitioners – giving the questionnaire a sense of balance.

**Figure 3: Length of Time spent in the Music Industry**

3. How long have you been involved in the live music industry?

Between 1 - 5 years:	<input type="checkbox"/>	16.9%	10
Between 6 - 10 years:	<input type="checkbox"/>	22.0%	13
Over 10 years:	<input checked="" type="checkbox"/>	61.0%	36

As Figures 4 and 5 outline, the vast majority (56%) of respondents were based in South Wales, and consider themselves to be “full time” professional (60%). The data regarding business location is once again congruent to the Welsh Music Foundation research I conducted (where 67% of the sample lived in South Wales), and to some degree simply reflects population demographics, in addition to where the majority of music business activity is centred. 23% of the responders lived outside of Wales – although most of this section had some involvement in the Welsh industry, the questionnaire was very occasionally completed out of interest.

**Figure 4: Where the Main Business is Located**

4. In what area(s) of Wales is your main business centred?			
South Wales:		56.1%	32
Mid Wales:		7.0%	4
West Wales:		5.3%	3
North Wales:		8.8%	5
Other (please specify):		22.8%	13

**Figure 5: Full or Part Time Activity**

5. Is your role in music full or part time?			
Full Time:		59.6%	34
Part Time:		40.4%	23

In terms of industry training, 61% of the sample *had not* attended any training specifically related to live music. Those that had received training alluded to specific parts of degree programmes, short sound engineering courses, or in one instance, an Oxfam live event training session. Interestingly, this data contrasts strongly with the earlier research for the Welsh Music Foundation (Carr, 2011), where 76% of the sample indicated *they had* received some training in the music industry. As part of the Welsh Music Foundation’s remit is to offer training events to the Welsh industry, and the research questionnaire was largely implemented via a targeted mailing list through WMF, this reduction is likely to be due to many respondents in the earlier research having undertaken some sort of WMF training.

**Figure 6: Indicative Sample of Live Music Practitioners who have Received Training**

6. Have you ever attended any training courses related to your work in the live music industry before?			
Yes:		33.9%	20
No:		66.1%	39

When asked what type of training they would like to undertake, responses included marketing techniques, legal issues, health and safety, copyright, band management, business planning, taxation, budgeting, how to find work/CV generation, how sub sectors of the live music sector interconnect, event management, stage management, understanding local scenes, stage craft, marketing techniques, promotion, live sound, and obtaining funding. Most importantly, as indicated in figure 7, the vast majority of respondents believed the *skills to be more important than the qualification*. Indeed, not a single respondent believed the qualification to be the dominant factor. To some degree, the importance of skills over qualifications reflects the relatively low number of respondents who have undertaken training, and represents a major challenge for Higher Education providers who are attempting to work with industry. As indicated below,

when interviewing one of the most established promoters in the UK – Stuart Galbraith (MD of Kilimanjaro), a person’s ability to simply “do the job” often take preference over qualifications, a factor that my own experience indicates is reflected throughout many areas of the music industry. Indeed a focus group conducted as part of this research with Cian Ciaran (Keyboard player - Super Fury Animals), John Rae (Bafta Award winning composer based in Cardiff) and live music entrepreneur Simon Kingman indicated that the lack of understanding of precisely what university qualifications offer by both the industry and students (specifically mature ones considering upgrading their skills) is an issue that requires attention. Suggestions included the recruitment of credible patrons, clear guidelines regarding the *structure and benefits* of courses in language that is easily understood, and positioning courses overtly within wider “hubs of excellence”. It was suggested that the latter should not be purely “research centre” focused (which were perceived as attracting mainly academics), but situated to offer networking and job opportunities, internships, current industry news and opinion, examples of student work, and thoughts about skill and career development.

**Figure 7: How Important are Qualifications?**

8. What is most important to you regarding any training/qualification you undertake?			
The Skills I learn:		63.8%	30
The Qualification:		0.0%	0
Both:		36.2%	17

As indicated in Figure 8, when asked how they would like to receive training, unsurprisingly (considering the demographic of the responders), the majority (74%) of the sample were interested in studying part-time (one or two sessions per week), with only 20% indicating they would prefer to study full-time. Therefore, in order to engage with employed people, it is logical to suggest that Higher Education providers should focus on innovative ways of developing flexible content that facilitates practitioners to engage with programmes of study *within and between* their working lives.

**Figure 8: Preferred Modes of Study – Full Time or Part Time?**

9.a.i. Full Time over one, two or three years			
Yes:		20.5%	8
No:		79.5%	31

9.b.i. Part Time (one or two sessions per week)			
Yes:		71.4%	30
No:		28.6%	12

When asked if they would prefer a mixture of traditional “face to face” delivery *and* distance learning, or purely the latter, the sample suggested that a mixture would be preferable. Once again this response is understandable, due to the high percentage of the sample being interested in part-time delivery. As indicated above, if practitioners already working in the live music industry are to be attracted to Higher Education, the challenge is to develop *Blended Learning* pedagogical models that resonate in terms of content and delivery.

**Figure 9: Preferred Modes of Study 2 – Distance Learning or Face to Face?**

9.c.i. A mixture of face to face teaching and distance learning			
Yes:		72.7%	32
No:		27.3%	12

9.d.i. Entirely Distance Learning			
Yes:		30.5%	15
No:		61.5%	24

As with the research for the Welsh Music Foundation (which indicated a 71% positive result), the majority of the sample stated that they would be interested in some sort of training, with the preponderance of responses stating they had either ‘no preference’ or would prefer ‘one off accredited workshops’. The relative lack of interest in accredited Foundation Degrees reflect the perceived irrelevance of qualifications outlined above – something that Higher Education needs to address by ensuring: 1) employers understand what skills students will have if they have obtained specific qualifications, 2) the students themselves have a clear understanding of the relationship between skills and qualifications. 3) that both parties are convinced that course content is relevant to the sub-sector of live music they are working in.

**Figure 10: Perceived Interest in Education/Training**

10. Would you or your organisation be interested in attending education/training provision in the future?		
Yes:		78.4% 40
No:		21.6% 11
10.a. If you answered 'yes' to the above, would you be interested in:		
One off unaccredited workshops?:		n/a 17
University accredited music industry training/education that potentially leads to a Foundation Degree?:		n/a 12
No preference.:		n/a 18

As indicated in Figure 11, the majority of respondents indicated that they would only be prepared to travel up to 20 miles for training, a figure which on one level conflicts with the lack of interest in purely distance learning delivery. However, conferences such the 2008 Sŵn Festival at the University of Glamorgan mentioned earlier have verified that transport is an issue in Wales, which may not only prohibit the public from going to concerts, but also to education establishments. In order to circumnavigate these issues, Higher Education appears to have the following options: to either deliver programmes locally (via local colleges or private venues), to develop more conducive and attractive ways of delivering content online, to consider more flexible 'traditional' delivery methods, or of course to develop courses that practitioners are prepared to travel longer distances to.

**Figure 11: Distance Students are Prepared to Travel**

11. How far would you be prepared to travel?		
1 -- 20 miles:		55.6% 25
21 -- 40 miles:		20.0% 9
41 miles and over:		24.4% 11

On this point, 78% of the sample stated they would be interested in weekend residential delivery, and although not implicit in the results of the questionnaire, it is proposed that this is related to both cost and time efficiency. Regarding the former, the overwhelming majority of the sample stated that they would be prepared to pay either all (30%) or some (50%) of the course fees, with the remainder (20%) expecting the cost of training to be completely free.

**Figure 12: Cost of Training and Interest in Residential Delivery**

12. Would you be prepared to pay if the training was appropriate			
Yes: I would pay the entire cost if the training was appropriate.:		30.4%	14
Yes: providing the government subsidised part of the training.:		50.0%	23
No: I would expect the programme to be free.:		19.6%	9

13. Would you be interested in residential long weekend programmes?			
Yes:		77.8%	35
No:		22.2%	10

On the subject of “flexible delivery” methods, accreditation for current and past experience is a mechanism that many other industries are engaging with (See Carr, 2010), although the music industry (and associated education providers) seem slow to catch on. Results from this small sample indicate that there is an overwhelming interest in gaining qualifications based on past and current experience. This is a pedagogical mechanism I have personally explored via recent funding from the European Social Fund – to develop and implement a distance-learning based Foundation Degree in Music Industry Entrepreneurship (2011).<sup>41</sup> This qualification is aimed specifically at the Convergence Areas of the Welsh music industry and includes the opportunity to gain academic credit for current working practices, in addition to experience practitioners have already achieved (via Accreditation for Prior Experiential Learning (APEL) and Accreditation for Prior Certificated Learning (APCL)). As part of the ongoing refinement of this initiative, the project team are also considering the use of *Shell Units*, which facilitate less experienced music industry practitioners to undertake internship type relationships with employers as part of their Learning Agreement. The content of these units are partially determined by the practitioner, depending on the type of work based activity they are involved in – although they must be “signed off” by academic supervisors. Although the project is in the early stages, the pedagogical structure is showing encouraging signs for practitioners involved in live music, with a number of the more experienced cohort on target to complete a full Foundation Degree in just over 12 months.

<sup>41</sup> See <http://cci.glam.ac.uk/music-academy/>

**Figure 13: Interest in Gaining Qualifications Based on Past and Current Experience.**

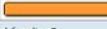
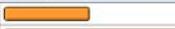
14. Would you be interested in obtaining part of a qualification based on your previous experience?			
Yes:		86.7%	39
No:		13.3%	6
15. Would you be interested in gaining credit for what you already do in the workplace?			
Yes:		85.1%	40
No:		14.9%	7

When asked what the most important skills are for success in the future, replies were wide-ranging, with the more pertinent comments including effective marketing, bookkeeping, industry knowledge, e-sales and e-marketing, flexibility, interaction with other media organisations, specific skills such as promotion and networking. The following comment by one responder possibly summarises the challenge that Higher Education faces

*‘[the live music industry requires] Real hands on skills and contacts to actually get the gigs and get a good fee, sustain them and actually make some money, hard contacts and real help, not beating around the bush with things we already know’.*

Although most responders were aware of Foundation Degrees and BTEC National Diplomas, the majority were not aware of Creative Apprenticeships, Creative and Cultural Skills nor indeed who to contact when requiring funding for their business. Although Higher Education has no control over lack of awareness of Creative Apprenticeships, knowledge of funding mechanisms could be built into course structures, in particular those with an entrepreneurial or music industry focus. As outlined above, Arts Council monies such as the Music Industry Development Fund and Welsh Government funding via the Major Events Unit offer real opportunities for practitioners to develop and build upon their careers, and should therefore be part of the knowledge base that Higher Education imparts.

**Figure 14: Awareness of Select Qualifications and Organisations**

17.a. Do you know what a Foundation Degree is?			
Yes:		87.7%	50
No:		12.3%	7
17.b. Do you know what a Creative Apprenticeship is?			
Yes:		42.1%	24
No:		57.9%	33
17.c. Do you know what a BTEC National Diploma is?			
Yes:		80.7%	46
No:		19.3%	11
17.d. Do you know what The National Skills Academy is?			
Yes:		22.8%	13
No:		77.2%	44
17.e. Do you know who Creative and Cultural Skills are?			
Yes:		37.5%	21
No:		62.5%	35
17.f. Would you know who to approach if you required funding?			
Yes:		31.6%	18
No:		68.4%	39

## Case Study Interviews

### Phil Sheeran (General Manager of Cardiff Motorpoint Arena)

Sheeran is General Manager of the Motorpoint Arena, the largest indoor venue in Cardiff, now owned by Live Nation. The conversation commenced with a general discussion around what Sheeran considered the key issues for the Welsh Music Industry: the closure of small venues and the need for a mid size venue in Cardiff. As outlined in previous research (Carr, 2011), these factors have previously been perceived as perpetuating a lack of facility for local bands to progress through the ranks and build their experience and audience – key factors in the development of a local live music scene. Sheeran also compared Cardiff to live music scenes in Manchester and Dublin, where live music infrastructures were considered far more amenable to grass root development of bands. The discussion also covered how the music scene in South Wales suffers from being too close to London, and North Wales to Manchester. Unlike the live music scene in Scotland for example, this fact makes it relatively easy for talented musicians and entrepreneurs within Wales to simply move out of the country in order to progress their careers.

This general discussion was followed by an introduction from Paul Carr on the aims of the research, and the importance of Higher Education interfacing with the music industry on a number of levels. Carr also provided a brief history of Foundation Degrees, and how despite being in existence for over 10 years, the qualifications were still not serving the purpose for which they were originally designed. This was followed by an explanation of the newly developed European Social Funded Foundation Degree in Music Industry Entrepreneurship based at the University of Glamorgan's ATRium campus in Cardiff. When asked how relevant qualifications such as this are to the industry, Sheeran commented

*On the technical side [they do] mean a lot, we want to get the best sound engineers, we want to get the best technical managers, we want to get the best stage managers.*

However, the course as it stands was not seen to necessarily offer ways of working with the small agent and promoter cartels that exist in Cardiff, or indeed more specific live music related jobs such as Venue Management, Band Management, Promotion, or Agency work, where Sheeran noted that despite having a degree, new employees will probably still have to 'work their way up from entry level positions'. However, Sheeran also believed that a lot of employers do want to take on "qualified" people, due to the transferable skills degree qualifications offer. The conversation progressed to discuss Sheeran's time as a trainee manager, where much of the on-site training was simply observation based, not structured in the traditional sense, with the emphasis based on one's ability to "learn on your feet". This of course links in with many roles within live music, which are often perceived as not having any "career structure", with success often being founded on "what" and "who" you know – as opposed to specific qualifications.

In terms of current provision and how Higher Education can assist this situation, it was noted by Carr how very few live music courses in Higher Education are based in music departments, with Sheeran confirming how a venture such as “Venue” Management is in fact “Business” Management, with many of the key skills required (for example accounts, purchase Ledgers, relationship management, relationship building, etc.) not necessarily being considered high priorities in music departments. Sheeran noted how staff who work at the Cardiff International Arena originally commenced in lowly positions, with staff who are deemed to have potential getting offered more responsible positions within the organisation once they have built up trust and displayed their potential worth. Carr then explained a new initiative being tested within the University of Glamorgan, that of the interface of work-based shell units within degree music programmes. This initiative currently offers students the potential to replace 20 credits in year 2 of their degree programme with an internship type study, with the student undertaking either a “short fat” (for example during a holiday period) or a “long thin” (for example during a semester or term) period of activity, which is accompanied by an annotated analytical reflection. Accepting the logistical issues of students entering the establishments such as Cardiff International Arena, the flexibility of the initiative was deemed a potential way forward to encourage partnership arrangements. The “realism” of placements such as this were deemed to be important to both Sheeran and Carr, where students get the opportunity to observe and engage with areas of the industry that may on the surface be perceived as “boring”.

As indicated in previous research with Roland UK (Carr, 2010) staff training is often “in-house” and not accredited, and Sheeran confirmed that this was also the case with Live Nation, which is often led by private training companies that are not accredited. Indeed Sheeran believed that roles such as spending time on the shop floor, spending time in the security control room, or simply listening to radio traffic provide an excellent snapshot of the issues that often surround live music in a major venue. He also reiterated the growing importance of roles not normally associated with live music, such as Security, Catering, Insurance, Tour Management/Logistics and Staging – factors that are “event management” related.

### **Hamish Birchall (Freelance Musician and Live Music Lobbyist)**

Birchall is a London based freelance musician. In 2001– 2003 he also worked as a Parliamentary lobbyist for the Musicians' Union, seeking music-friendly amendments to the then Licensing Bill, now the Licensing Act 2003. From 2006–12 he was an adviser to Liberal Democrat peer Tim Clement-Jones, working on what is now the Live Music Act 2012.

After discussing the development of the Foundation Degree in Music Industry Entrepreneurship, it was noted by Carr how the general opinion by music industry stakeholders during the 'Investigating the Music Industry in Wales' research was that *skills gained* during a training programme were more important than the *qualifications gained*. This is a factor that has been reiterated in the online questionnaire, in addition to the *21<sup>st</sup> Century Musician* conference at Kingston University (2 May 2012). Birchall, noted that this perspective may be age related, with the "optimism" of youth often being replaced with more realism as a music career progresses, and this perspective is congruent to a number of musicians I have met professionally – many of who begin to value the doors that qualifications can open, later in their careers. In a recession, Birchall noted how qualifications begin to become more particularly important for musicians such as himself, with teaching and even non-music roles becoming more prominent in a musicians' portfolio career when work become more scarce. It was also noted how the much overlooked role of the freelance jobbing musician is becoming more difficult to sustain financially, with the amount of work and rate of pay having reduced substantially in the last 25 years or so.

Discussion revealed that the history of many great musicians who have worked within this genre are in danger of becoming obsolete unless research is undertaken, and a critical investigation into the important role of these musicians is something colleagues within Higher Education could undertake. Discussion with Birchall also revealed how much of the curriculum in Higher Education tends to focus on *global* issues (for example record contracts, digitisation and copyright), as opposed to "nuts and bolts" factors such as the negative impacts of the 2003 Licensing Act, Arts Council Funding, health and safety, and how changing Government and Local Authority policies affect local concerns. This led to the question: is it time for Higher Education to refocus its priorities regarding the knowledge students require in order to make a living in music?

## **Gwilym Evans and Amanda Richards (Major Events Unit)**

With a budget of approximately 5 million per year, The Major Events unit (which is part of the Welsh Government) is committed to supporting the development, and raising the profile of, Wales' ability as a nation to host a wide and growing number of large events – including those related to music. The unit currently supports Welsh based music festivals such as Wakestock,<sup>42</sup> Glass Butter Beach,<sup>43</sup>

The Sŵn Festival,<sup>44</sup> Merthyr Rocks,<sup>45</sup> and the Greenman Festival.<sup>46</sup> In 2011 – 2012 the Major Events Unit provided a six month intern opportunity for a student from the University of Glamorgan's Events Management Course. The placement provided the student with an opportunity to see at first hand, and engage with, policy making in practice, by working on the development of a skills action plan – a commitment of the Major Even Unit's 2010 – 2020 strategy document. It was suggested that providing a strategic objective made it a far more productive experience for the student, as they had a clear function during their internship. It was also suggested that the unit would be happy to offer similar opportunities in the future to Wales based event management students.

The subject of finding out about suitable internships was also discussed, with the possibility of using the Major Events Unit web site (currently under development) being suggested as an excellent way of linking the live music industry with potential students. By way of alternative practical experience, if particularly “entrepreneurial” students had a realistic and strong event proposal that they wished to develop to the appropriate level required for a formal application, the Major Events Unit suggested they would be happy to assist the student – considering the application in the same context, and against the same criteria, as any other application it received. In awarding grant funding to events, the Major Events Unit agrees appropriate targets for the event including the number of visitors, and percentage of those coming from outside Wales, inclusion of appropriate quota of Wales based artists/participants (if applicable/appropriate to that event), use of local supplies and services, ability of the event to raise Wales' profile and, in support of the Skills Action Plan, the provision of suitable student placement/internship opportunities and/or volunteer opportunities if appropriate.

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<sup>42</sup> See <http://www.wakestock.co.uk/>

<sup>43</sup> See <http://www.glassbutterbeach.com/>

<sup>44</sup> See <http://swnfest.com/>

<sup>45</sup> See <http://www.hayfestival.com/merthyrrock/index.html>

<sup>46</sup> See <http://www.greenman.net/>

### **Johnny Phillips (SJM Concerts)**

Commencing his career in South Wales, Phillips now works for SJM Concerts, one of the largest concert promoters in the UK. Phillips discussed a history of what he considered poor professional practice in Wales, with issues such as poor PA systems, high ticket prices and artists not being paid negatively impacting relationships with outside agencies in particular. The general discussion centered once again on the lack of venues in South Wales, and those that were in existence charging too much money for entrance. A lack of dialogue *between venues* was also alluded to, with a strategic pooling of resources (for example newspaper adverts) being suggested as a cost effective way of ensuring events don't overlap, and pricing is considered sensibly and coherently.

### **Peter Florence (Director Hay Festival)**

Peter Florence is director of Hay Festivals – being responsible for programming the various events at the organisation's various festivals throughout the world, including Hay on Wye. The festival currently has a number of partnerships with UK universities – including Cambridge, Cardiff and at one point Glamorgan. Although none of these relationships are specifically related to music, the festival currently works with The Royal Welsh College of Music and Drama – who situate selected musical events throughout the duration of the main festival at Hay on Wye. The headquarters of the festival at Hay on Wye employs between 14–20 staff – most of who are drawn from the local area. Many of these staff began their relationship with the festival during internships – having gradually obtained employment once their graduate studies were complete. Indeed it was interesting to note that the festival has an interest in forming “strategic relationships” with local universities, with Florence showing a willingness to provide guest lectures or facilitate internships.

Regarding the latter, and in congruence with the Major Events Unit – it was suggested that working on specific “real world” projects was the most prudent way forward in terms of students obtaining experience that was useful for both them – and the festival. When asked to comment on the live music industry in Wales, Florence stated that the most important advice he could give to would be promoters is to ensure that *music is the instigator* – as opposed to cultural or economic priorities. Although these factors were seen as important, Florence confirmed that in the case of the Hay Festival – the actual speaker or music are the main driving forces – believing that if the artistic quality of these events are in place – financial and cultural impact will follow. When asked what he looked for in would be employees, Florence confirmed that students with Media Studies type degrees often did not have the qualities he was looking for – preferring either students with direct experience, or with proven critical thinking skills (which were seen to not be necessarily be a part of many music degrees).

### **Steve Henderson (Leeds Metropolitan University)**

Steve Henderson is Senior Lecturer and module leader on Leeds Metropolitan University's BA (Hons) Events Management degree – one of the largest courses of its type in the UK. The programme offers students the opportunity to examine and gain experience in a wide variety of events, broadly categorised as Major and Cultural Events, Sports Events, Conferences and Exhibitions, and Fundraising (for charities) and

Sponsorship. Henderson outlined how students are initially attracted to the perceived “glamour” of working in the entertainment industries, a factor that in some cases results in students leaving in year one – when they are faced with the reality of management issues such as obtaining funding, risk assessment, etc.

Year 2 of the four-year programme consists of a work placement, which aims to provide students with a realistic perception of what event organisation is. Although placements often took place with a single organisation several years ago, the combination of increased numbers partaking in Higher Education, combined with the recession, has resulted in single venue placements becoming more problematic. The common format that students undertake today ends to consist of shorter “blocks” – through which they undertake a number of activities with multiple organisations. Whereas students may have been paid a salary for these placements several years ago, due to the amount of competition for graduates gaining experience through internships – these activities are now performed for minimal expenses or even free of charge for the company concerned. Henderson noted how the vast majority (around 80%) of students undertaking the award are female, with the resulting male students being interested in either sport or music industry related events.

### **Stuart Galbraith (Kilimanjaro)**

Stuart Galbraith is MD of one of the largest promoters in the UK – Kilimanjaro.<sup>47</sup> Like many promoters, Galbraith’s careers commenced as a university social secretary, undertaking the position because of his love for music, prior to realising that he could make a living as a promoter. When asked if there were any specific issues related to promoting music in Wales, the main trait was perceived as slow rate ticket sales – a factor which has been highlighted at various points throughout this report. Galbraith’s view on this was that in Wales ‘you get there in the end – it just takes time’. Kilimanjaro’s recent acquisition of Wakestock,<sup>48</sup> an event in North Wales and billed as Europe’s largest Wakeboard Festival,<sup>49</sup> is like other English based purchases of Welsh events (such as the Greenman Festival in Crickhowell), controversial to many involved in the Welsh music industry. Although the primary criticism is one of finance not remaining in Wales, Galbraith alluded to a recent economic impact exercise his company conducted – which proposes the event contributes approximately £3 million to the local community per year. The event also employs three people locally in Abersoch working full time on the organisation of the festival. Regarding more general issues with promoting music in Wales, Galbraith alluded to the lack of venues in Wales – stating that it is problematic for a major promoter to promote music outside of Cardiff

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<sup>47</sup> See <http://www.kililive.com/about/>

<sup>48</sup> According to Galbraith, Wakestock was acquired after it was facing impending bankruptcy, with Kilimanjaro not only keeping the initiative afloat, but also developing it to become the successful event it is today.

<sup>49</sup> See <http://www.wakestock.co.uk/>

(Swansea was used as an indicative example). When asked why some artists seem to simply bypass Wales when touring, Galbraith alluded to the fact that it is often simply not financially viable. Although no detail was discussed due to time restrictions, it was confirmed that Kilimanjaro have an intern scheme.

### **Simon and Helen Kingman (Live Music Entrepreneurs and Lecturers)**

Simon Kingman has a background as a freelance musician and music entrepreneur, who alongside his wife, Helen Kingman, developed one of the most originally themed popular music venues in Cardiff – The Toucan Club (1995–2009–). Helen has a background working for Cardiff Council as a Special Events Manager on events such as the development of Cardiff Bay, The Big Weekend and the Millennium celebrations, and is currently a part-time lecturer on the University of Glamorgan’s Events Management Degree. Simon is currently a freelance musician and part-time lecturer at Cardiff and Vale College, in addition to continuing to be involved in live music as a musician and promoter.

The initial conversation commenced with the often overlooked importance of “generic” analytical skills to the music industry practitioner. As indicated in earlier stakeholder interviews, the ability to simply “do the job” is often prioritised over qualifications by employers, and the gap between these two extremes was once again discussed as a significant factor to bridge. In terms of self employment, the importance of a musician’s capacity to *promote themselves*, in the early stages of their careers in particular, was considered an essential aspect of a portfolio practitioners’ armoury – and it was therefore suggested as a vital discipline to include in undergraduate programmes. It was also interesting to note how the Kingman’s considered a musician’s interface with small live music venues to have returned to practices similar to 20 years ago – where the band themselves are often provided with a venue (with or without a charge), with the onus subsequently being on them to ensure it is suitably attended.

As outlined by Hamish Birchall above, it was also noted how freelance musicians’ fees have not really increased in the last 20 years, placing a greater emphasis on practitioners broadening their skill base and considering alternative ways of making a living – alongside live music. The conversation finished with a discussion concerning the interrelationship between cultural events such as live music and “red tape” legislation instigated by the likes of local councils. This was considered to be a potential barrier to creativity, with networking events between the two parties suggested as a potential way of assisting symbiotic understanding.

## Conclusions and Recommendations

From a music industry perspective, the recent acquisition by Live Nation, of data entertainment firm Big Champagne,<sup>50</sup> could be considered a microscopic indicator of how the global live music industry is changing, and the financial and intellectual property emphasis that is being placed upon it. According to Hypebot.Com's Bruce Houghton, the takeover represents the essential next step to drive a transformation of live music based on data rather than the antiquated assumptions of the old guard music industry (Houghton, 2012b). However, if we regard this purchase more cynically, it clearly follows the paradigm that is pervasive throughout the history of recorded music: the purchase the smaller innovative companies by a dominant wealthy few (ironically, what Houghton describes as the antiquated "old guard") – an oligopoly that facilitates the capitalist society both Higher Education and the Music Industry operate in.

Within this environment, the Higher Education sector is going through a period of great change, with "New Universities" in particular having to face up to issues such as employability, the influx of private providers, and validation powers in Further Education Colleges, not to mention the unknown impact that increased student fees may have on the entire sector. In Wales of course there is also the question of impeding university mergers, and although the exact details are not known yet, the Welsh Higher Education sector of the future will look very different to what it does today.

The question for Welsh Higher Education music departments engaged in live music, is how to negotiate these independent, powerful forces. How do we engage with both the national and international live music scenes from a pedagogical, industrial and research perspective, ensuring our students gain a relevant and academically challenging experience, while undergoing the changes to Higher Education and the live sector as outlined above?

It is apparent from this report, in addition to previous investigations undertaken, that in order to answer these questions the Welsh music industry requires far more research into its various infrastructures – of which Higher Education can play a part. Although not an exhaustive list, issues such as why bands bypass Wales when touring; transport issues to and from venues; publicity infrastructures in the capital and throughout Wales (Do audiences feel informed? What community and local Council activities are already taking place?); working relationships between venues, local councils and national promoters; and the relationships between live music and cultural tourism (from both an import and export perspective),<sup>51</sup> are indicative of factors that not only require on-going research, but also should be included into taught music industry modules, that from experience tend to focus on global rather than local paradigms. Although some parties within the Welsh music industry would question its relevance – arguing that academic exercises such as this represent the pinnacle of the "knowledge resistance" outlined earlier, in

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<sup>50</sup> See <http://bcdash.bigchampagne.com/what>

<sup>51</sup> A recent conference was organised on this very subject at Liverpool University: see

<http://soundtracksconference.wordpress.com/>

congruence with the numerous nations mentioned in this report, it is suggested that a comprehensive mapping document of Wales is required, documented independently, and including a critical investigation of what could be learned from nations such as Scotland, New Zealand and Finland – the latter who seem particularly successful in fostering government support for performing live music abroad.

Regarding pedagogical initiatives, in congruence to the University of Bolton's relationship with the Backstage Academy, and the University of Plymouth's work with Deep Blue Sound, it seems prudent for Welsh Higher Education to continue to investigate what industrial and governmental bodies it can work with in order to address the specific skill gaps referred to by Creative and Cultural Skills, and most importantly how they impact the Welsh live music industry. As stated earlier, keeping intellectual property and income streams within Wales is an essential factor if the industry is to build upon the £60 turnover outlined above, an increase which is essential if the Welsh industry is to become truly self-sufficient.

Considering that part of this skill gap needs to be targeted at practitioners *already working* in the Welsh Music Industry, it is also logical to suggest that Higher Education needs to investigate part-time, distance learning and particularly “accelerated” provision – in order to open up these markets, so Higher Education institutions can facilitate practitioner engagement *within* and *between* their working lives. As stated in the stakeholder interviews section of this report, a number of industrial and government bodies are open to the idea of strategic work placements, and in congruence with the likes of Buckingham New University, the instigation of “production companies” within the Welsh university sector would potentially facilitate outward facing, industry focused “centres”, that would encourage music departments to engage with mechanisms such as APEL, accreditation for current work based learning, in addition to ensuring “traditional” undergraduate students get the opportunity to engage in meaningful, accredited scholarship with the live music industry. As suggested earlier, positioning these industry focused centres as part of a “creative hub”, which includes networking, internship opportunities, current industry news, guest blogs etc. also appears to provide a strategic opportunity to encourage the live music sector to engage with higher education more productively – something which is essential if these proposals are to move forward.

The *importance of skills*, and the relative *lack of interest in accreditation* outlined in both the questionnaire and some stakeholder interviews reflects larger scale studies carried out by Creative and Cultural Skills (Wenham and Felton, 2011) a Creative and Cultural Industries Workforce Survey (Anonymous 9, 2009), and a recent 63 point plan recently launched by the Welsh Government (Matthews, 2012) – all of which suggest that Higher Education is not currently serving industry with the skills it needs. Announced in partnership with Welsh universities, the Higher Education Funding Council for Wales (HEFCW) and the Confederation of British Industry, The Skills and Employability Framework is still in draft stage at the time of writing, but according to Matthews, includes actions related to increasing the number of students enrolled on employer approved courses; increasing the number of courses co-designed by employers; in addition to improving the opportunities for work placements (*Ibid.*). These governmental proposals look encouraging for facilitating some of the proposals in this report,

however, as outlined earlier, in the music industry, the grey area between skills and qualifications can only be alleviated if:

- 1) Employers understand what skills students will have once they have obtained specific qualifications.
- 2) Students themselves have a clear understanding of the relationship between skills and qualifications.
- 3) Both parties are convinced that course content is relevant to the sub-sectors of live music they are working in.

It is understood that mutual trust between the live music sector and Higher Education will not develop overnight, and initiatives such as the forthcoming Framework for Skills and Employment and the The Live Music Exchange is for the first time beginning to facilitate how both parties can constructively work together. Based on some of the work undertaken as part of this report, the next Live Music Exchange event is planned to be in Cardiff, as part of the 2012 Sŵn Festival in October 2012, and it is envisaged this will provide a strategic opportunity to explore further how Higher Education can facilitate the economic and cultural development of live music in Wales.

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