MAPPING THE MUSIC INDUSTRIES IN WALES

A REPORT FOR CREATIVE WALES

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BACKGROUND AND INTRODUCTION

In July 2020, I was commissioned by the Culture Welsh Language and Communications Committee (CWLCC) to document a report examining the 'state of play' in the post COVID-19 music industries in Wales. The resultant document,[1] which was submitted in October 2020, had the objective of outlining the contextual backstory of the emergence of private and public sector support in the UK and Wales; examining the 'roadmap' advice given to the music industries; reviewing the industry and academic research that had emerged and finally, comparing Welsh Government support packages to nations in other parts of the world. Although the report considered the Welsh music industries more broadly, its primary focus was on live music.

Two months after the aforementioned report was published, the CWLCC submitted their *Turn up the Volume* document to Welsh Government (in December 2020), which contained some of the key recommendations contained in my earlier report.[2] Welsh Government's official response was published in February 2021.[3]

In September 2021, on behalf of the University of South Wales, I began a piece of research, in conjunction with Creative Wales, which aimed to implement two of the actions contained in the aforementioned Welsh Government response.

Namely: a) mapping live music venues, recording studios and dedicated rehearsal studios via a forward-facing digital portal (Recommendation 3); and b) an economic costing of the Welsh music industries (Recommendation 2).

I worked on the digital map alongside Dr Craig Hamilton (Birmingham City University), Dr James Rendell (USW), Luke Thomas (PhD candidate at USW) and students from the University of South Wales' BA in Music Business. For the economic costing of the Welsh Music Industries, I worked alongside economist Johnathon Todd from Bop Consulting. I would like to thank all of these colleagues for their invaluable assistance with this research.

This document focuses on the results of the digital map, with two accompanying separate reports produced for the economic costing of the Welsh music industries, pre and post COVID-19.

Professor Paul Carr
June 2022

THIS REPORT OUTLINES THE CONTEXTUAL BACKSTORY OF THE EMERGENCE OF PRIVATE AND PUBLIC SECTOR SUPPORT IN THE UK AND WALES.

[1]Carr 2020. See http://livemusicexchange.org/resources/the-welsh-music-industries-in-a-post-covid-world-a-report-for-the-culture-welsh-language-and-communications-committee-professor-paul-carr/
[2]Culture, Welsh Language and Communications Committee 2020. See https://senedd.wales/media/ewabu3hc/cr-ld13957-e.pdf
[3]Welsh Government 2021. See https://senedd.wales/media/25hltw5q/gen-ld14091-e.pdf

HEADLINE OBSERVATIONS

The digital map consists of 554 businesses, comprising of 75 recording studios, 7 dedicated rehearsal studios and 472 music venues of various sorts.

When considering the ecosystem of music venues, recording studios and dedicated rehearsal spaces, Cardiff has the most businesses (64), followed by Swansea (49), Carmarthenshire (48), Pembrokeshire (43) and Powys (36). The Isle of Anglesey and Torfaen have the least number of businesses (7), followed by Vale of Glamorgan (8), Blaenau Gwent (11) and Flintshire (12).

Only three authorities (Cardiff, Caerphilly and Vale of Glamorgan) have both recording studios and dedicated rehearsal studios complementing their music venues.

In the current map, the local authority of Swansea marginally has the most music venues (47), followed closely by Cardiff (45), Carmarthenshire (44) and Pembrokeshire (42). The Isle of Anglesey, Torfaen and Vale of Glamorgan have the least number of music venues (5), followed by Blaenau Gwent (8) and Flintshire (10).

The authority of Cardiff has the most recording studios (15), followed by Ceredigion (7), Powys (6) and Monmouthshire (5). All authorities aside from Merthyr Tydfil contain at least one recording studio.

There are only 7 dedicated rehearsal studios in Wales, with 4 of them being centred in Cardiff.

Music Festivals are pervasive across Wales, with Powys being the authority with the most (10), followed by Gwynedd (5), Swansea (4) and Ceredigion (4). Our research did not identify any music festivals in Neath Port Talbot, Newport or Rhondda Cynon Taf.

Cardiff and Swansea are the authorities with the most Grassroot Music Venues (7 and 5 respectively), followed by Wrexham (3), Rhondda Cynon Taf (3), Newport (2), Flintshire (1) and Monmouthshire (1). All other authorities did not feature a Grassroots Music Venue. This results in swathes of West, Mid and North Wales without a grassroots music venue.

Carmarthenshire is the authority with the most music Pubs (21), with these venues distributed to a greater or lesser extent throughout all authorities. However, it is important to highlight that these venues are also the most difficult to track, with music events often being informal, irregular and not always well publicised.

Powys is the authority with the most Arts Venues (6), followed by Cardiff (4), Gwynedd (4), Swansea (3), Newport (3), Blaenau Gwent (1), Ceredigion (1), Vale of Glamorgan (1), Neath Port Talbot (1), Pembrokeshire (1) and Wrexham (1). The research did not uncover any Arts Venues in the other local authorities.

Considering the amount of live music activity taking place in Swansea, it was surprising that the authority has only 2 recording studios.

All authorities feature a Theatre that includes live music in its programming, aside from Merthyr Tydfil, Blaenau Gwent, Caerphilly, Vale of Glamorgan, Isle of Anglesey, Newport and Torfaen.

The authority of Ceredigion has the lowest ratio of population to music venues (2804 to 1), closely followed by neighbouring Pembrokeshire (3018 to 1), Gwynedd (4316 to 1), Carmarthen (4320 to 1), Powys (4434 to 1) and Swansea (5246 to 1).

Those authorities with significantly the highest 'population to venue ratios' are Vale of Glamorgan (27059 to 1), Caerphilly (22716 to 1), Torfaen (18966 to 1), Flintshire (15685 to 1) and Isle of Anglesey (14088 to 1).

The average authority population to venue ratio across Wales is 9259 to 1.

Torfaen is the authority with the 'narrowest' range of venue types (for example Concert Halls, Social Clubs), while Cardiff, Swansea, Ceredigion, Wrexham and Gwynedd are among the authorities with the 'broadest'.

Torfaen, Caerphilly, Isle of Anglesey, Vale of Glamorgan and Blaenau Gwent all have less than ten venues in their respective authorities.

NUMBER OF FACILITIES IN WALES

At the time this report was completed in June 2022, the digital map consisted of 554 businesses, comprising of 75 recording studios, 7 dedicated rehearsal studios and 472 music venues of various sorts.

In the current map, the local authorities of Swansea marginally has the most music venues (47), followed closely by Cardiff (45), Carmarthenshire (44) and Pembrokeshire (42). These, alongside the other local authorities of Wales are listed below in Figure 1—ordered by the number of music venues per authority.

As can be seen in Figure 1, only three authorities (Cardiff, Caerphilly and Vale of Glamorgan) have both recording studios and dedicated rehearsal studios complementing their music venues. When considering the ecosystem of music venues, recording studios and dedicated rehearsal spaces, Cardiff has the most businesses (64), followed by Swansea (49), Carmarthenshire (48), Pembrokeshire (43) and Powys (36). The following table lists all 22 authorities in Wales, ordered by the total number of the music venues, rehearsal studios and dedicated rehearsal rooms.

	VENUES	RECORDING STUDIOS	REHEARSAL STUDIOS	TOTAL
Cardiff	45	15	4	64
Swansea	47	2	0	49
Carmarthenshire	44	4	0	48
Pembrokeshire	42	1	0	43
Powys	30	6	0	36
Gwynedd	29	4	0	33
Rhondda Cynon Taf	27	2	0	29
Ceredigion	26	7	0	33
Wrexham	25	2	0	27
Neath Port Talbot	24	3	0	27
Bridgend	23	2	0	25
Denbighshire	18	1	0	19
Newport	17	3	0	20
Monmouthshire	11	5	0	16
Conway	12	3	0	15
Merthyr Tydfil	11	0	1	12
Caerphilly	8	4	1	13
Flintshire	10	2	0	12
Blaenau Gwent	8	3	0	11
Vale of Glamorgan	5	2	1	8
Torfaen	5	2	0	7
Isle of Anglesey	5	2	0	7

Figure 1: Number of Music Venues, Recording Studios and Dedicated Rehearsal Studios Per Local Authority

PARAMETERS OF THE DIGITAL MAP

The map depicts the ecosystem of music venues, rehearsal studios and recording studios across Wales, which are selectable either individually or in combination.

In addition to outlining recording studios, dedicated rehearsal studios and 15 venue types across the country, the map also includes data on constituency, local authority, social media, contact details and distance to nearest train station.

In some cases, data on venue capacity is also available.

All data available on the map is publicly available and within GDPR jurisdictions.

The map also comes with an accompanying database, where the user can search for keywords such as venue types, locations, or venue names.

There are a number of venues that have been categorised as 'other' on the map, as it was felt they did not fit closely with the venue categories. All of the authorities aside from Blaenau Gwent, Monmouthshire, Torfaen and Merthyr Tydfil had venues of this type, which range from recreation, convention and community centres, sports clubs and stadia, public libraries and parks, museums, town halls, farm buildings, breweries, public buildings, church halls, country parks, shopping centres and pop-up spaces.

The current map does not proport to comprise of all music venues, recording studios and rehearsal studios in Wales, but should be considered as a substantive 'work in progress', which can be used as a discussion document with the music industry for comment and further refinement.

The number of venues outlined in Figure 1 does not reflect the economic contribution an authority's venues may have, as a single venue such as The Motorpoint Arena in Cardiff for example (with a capacity of 5000), will make a significantly greater economic contribution than a collection of smaller venues.

The map also does not necessarily reflect the amount of money that actually feeds back into the Welsh music ecosystem, with venues such as The Motorpoint and Swansea Arenas for example, being owned by corporations outside of Wales (Live Nation UK and the Ambassador Theatre Group).

Although the map does include the distances of venues to nearest train stations, it does not indicate access the general public may or may not have to music venues throughout the year, as some venues such as those in holiday destinations are seasonal.

In addition to seasonality, the map does not always reflect the regularity of live performance in specific venues, for example, The New Crown in Merthyr Tydfil, which features live music most days of the week takes up the same space on the map as the numerous other pubs which feature music far more infrequently.

POPULATION ACCESS
TO MUSIC VENUES

In order to gain insights into the access the population of an authority may have to music venues, the latest ONS statistics for the population were used,[4] with a 'venue-population ratio' determined by dividing authority population by the number of venues.

As outlined in figure 2 below, Ceredigion has the lowest ratio (2804 to 1), closely followed by Pembrokeshire (3018 to 1), Gwynedd (4316 to 1), Carmarthen (4320 to 1), Powys (4434 to 1) and Swansea (5460 to 1).

Those authorities with *significantly* the highest population to venue ratios are Vale of Glamorgan (27059 to 1), Caerphilly (22716 to 1), Torfaen (18966 to 1), Flintshire (15685 to 1) and Isle of Anglesey (14088 to 1).

The average authority population to venue ratio across Wales is 9259 to 1.

Cardiff and Swansea are the authorities with the most Grassroot Music Venues (7 and 5 respectively), followed by Wrexham (3), Rhondda Cynon Taf (3), Newport (2), Flintshire (1) and Monmouthshire (1). All other authorities did not feature a Grassroots Music Venue¬. This results in swathes of West, Mid and North Wales without a grassroots music venue.

One important reason for the lack of Grassroot Music Venues in some authorities could be age demographic, with all of the authorities without a grassroots music venue, aside from Caerphilly, Merthyr Tydfil and Torfaen being above the median age for Wales as a country (which is 42.4 years) according to the Office of National Statistics' (See Figure 2).[5]

Although Ceredigion and Pembrokeshire are the authorities with the lowest population to venue ratios, this does not take into account the fact that many of these venues will be seasonal, due to their reliance on tourism.

Those authorities with the broadest range of venue types (for example social clubs, concert halls etc) are Cardiff (12), Swansea (12), Ceredigion (10), Wrexham (10) and Gwynedd (10).

It is interesting to note that those authorities with higher population to venue ratios have a tendency to also have a low range of venue types, with Torfaen (featuring 2 categories – Social Clubs and Pubs) technically being the authority with the 'narrowest' set of venues, followed by Caerphilly (featuring 5 categories), Vale of Glamorgan (featuring 5 categories) and Isle of Anglesey (featuring 5 categories).

Torfaen, Caerphilly and Vale of Glamorgan's relatively close proximity to Cardiff may be one of the reasons for this 'narrow venue range', with these populations having the capacity to go to Wales' Capital to consume music, negating the need for more local venues. However, this is only speculation, so further research would be required in order to determine if this is the case.

The number of venues in an authority is probably a more accountable reason for authorities offering a narrow range of venues, with Blaenau Gwent and Merthyr Tydfil both having low numbers of venues and a low range of venue types (4 each) for example.

Despite their low venue tally, both the Isle of Anglesey and Flintshire however have a greater variety of venue types (5 and 6), with each of the 5 venues of the former being a different venue type.

It can be seen in Figure 2 that the increase in ratio between population and venue gradually rises between Ceredigion and Conway, followed by a sharp increase to the next authority, the Isle of Anglesey. Other sharp rises are apparent between the last four authorities – Flintshire – Torfaen – Caerphilly and the Vale of Glamorgan.

It is accepted that the impact of business rates, disposable income and gentrification on the viability of venues in an authority is also an important factor, although this has not been part of this research.

It is also important to highlight that an authority's position on either Figure 1 or Figure 2, does not necessarily indicate its importance to nurturing cultural talent, with authorities such as Newport, Rhonda Cynon Taff and Wrexham all featuring significant Grassroot Music Venues for example.

All populations of local authorities in Wales are listed in Figure 2 below – ordered by the ratio of population to music venues. The table also includes ONS data on the average age of each authority in 2020, the number of venues and the number of venue types. At 50.6 years, Powys has the highest median age in Wales, while Cardiff has the lowest at 33.6 years

AUTHORITY	POPULATION	PEOPLE PER VENUE	AVERAGE AGE	VENUE NO/ TYPES
Ceredigion	72895	2804 to 1	46.8	26/10
Pembrokeshire	126751	3018 to 1	48.5	42/9
Gwynedd	125171	4316 to 1	43	29/10
Carmarthenshire	190073	4320 to 1	46.6	44/8
Powys	133030	4434 to 1	50.6	30/9
Swansea	246563	5246 to 1	39.9	47/12
Denbighshire	96664	5370 to 1	46.6	18/8
Wrexham	136055	5442 to 1	42.5	25/10
Merthyr Tydfil	60424	5493 to 1	40.4	11/4
Neath Port Talbot	144386	6016 to 1	43.2	24/7
Bridgend	147539	6415 to 1	42.9	23/7
Cardiff	339202	7538 to 1	33.6	45/12
Newport	145700	8571 to 1	38.7	17/6
Monmouthshire	95164	8651 to 1	49.9	11/7
Blaenau Gwent	70020	8753 to 1	42.8	8/4
Rhondda Cynon Taf	241873	8958 to 1	40.6	27/6
Conway	118184	9849 to 1	50	12/6
Isle of Anglesey	70440	14088 to 1	48.6	5/5
Flintshire	156847	15685 to 1	43.8	10/6
Torfaen	94832	18966 to 1	41.9	5/2
Caerphilly	181731	22716 to 1	41.7	8/5
Vale of Glamorgan	135295	27059 to 1	43.7	5/5

Figure 2: Ratio of Venues to Population alongside Authority Average Age

STANDOUT TRENDS
OF EACH AUTHORITY

What follows are the 'standout trends' of each authority, starting with the lowest population-venue ratio. The venues highlighted only include those that have been found to feature live music.

Ceredigion (2804 people per venue) has 6 Pubs, 5 Restaurants, 4 Festivals, 4 Other, 2 Student Unions, 1 Arts Venue, 1 Hotel, 1 Nightclub, 1 Theatre and 1 Holiday Camp featuring live music. The research revealed no Arenas, Concert Halls, Social Clubs or Grassroot Music Venues. In terms of the wider music ecosystem, the authority features 7 Recording Studios of various sizes, some of which are residential. The authority has no dedicated Rehearsal Studios.

Pembrokeshire (3018 people per venue) has 13 Pubs, 9 Other, 5 Theatres, 5 Restaurants, 2 Hotels, 2 Holiday Camps, 2 Nightclubs (both in Haverfordwest), 3 Festivals and 1 Arts Venue – all of which feature live music. The research revealed no Grassroots Music Venues, Social Clubs, Student Unions, Arenas or Concert Halls. Regarding the wider music ecosystem, the research revealed the authority to have no dedicated rehearsal studios and 1 recording/project studio.

Gwynedd (4316 people per venue) has 9 Pubs, 5 Festivals, 4 Other, 3 Hotels, 4 Arts Venues, 1 Theatre, 1 Restaurant, 1 Nightclub and 1 Student Union live performance venue. The research revealed no Holiday Camps, Social Clubs or Grassroot Music Venues. In terms of the wider music ecosystem, the authority has 4 professional level recording studios (Sain, Studio Aran, Drwm and Studio One), one of which is residential and doubles as a rehearsal space (Studio One). There are no dedicated rehearsal rooms in the area.

Carmarthenshire (4320 people per venue) has 21 pubs, 4 Hotels, 4 Nightclubs, 4 Other, 3 Restaurants, 3 Social Clubs, 3 Theatres (Part of one venue) and 1 Festival (Festival of the Celts). The research revealed no Arenas, Concert Halls, Grassroots Music Venues, or Arts Venues. Regarding the wider music ecosystem, the research revealed the authority to have no dedicated rehearsal studios and 4 recording studios, including a community led initiative (Newid Studios, which has a rehearsal facility) and two residential recording studios (Red Kite and Mwnci).

Powys (4434 people per venue) has 10 Festivals, 6 Arts Venues, 4 Pubs, 2 Hotels, 2 Theatres, 2 Restaurants, 2 Other, 1 Social Club and 1 Holiday Camp. The research revealed no Arenas, Restaurants, Concert Halls, Grassroots Music Venues or Nightclubs that feature live music. Regarding the wider music ecosystem, the authority has no dedicated rehearsal studios and 6 established recording studios of varying sizes, including two residential spaces (Giant Wafer, Foel) and a newly established professional level studio (Twin Peaks).

Swansea (5246 people per venue) has 9 Pubs, 8 Social Clubs, 8 Other, 5 Grassroots Venues (2 Small, 2 Medium and 1 Large), 4 Festivals, 4 Nightclubs, 3 Arts Venues, 2 Restaurants, 1 Hotel, 1 Student Union, 1 Arena and 1 Theatre. The research revealed no Concert Halls or Holiday Camps. Regarding the wider music ecosystem, the authority has 2 recording studios (James Weaver Music and Rhondda Street Studios) and no dedicated rehearsal studios.

Denbighshire (5370 people per venue) has 6 Other, 4 Pubs, 3 Festivals, 1 Arena, 1 Holiday Camp, 1 Theatre, 1 Restaurant and 1 Nightclub. The research revealed no Hotels, Social Clubs, Grassroots Music Venues, Concert Halls, or Arts Venues featuring live music. Regarding the wider music ecosystem, the authority has 1 'project' recording studio (The Shack) and no dedicated rehearsal studios.

Wrexham (5442 people per venue) has 10 Other, 3 Grassroot music venues (1 Large, 1 Medium and 1 Small), 3 Pubs, 2 Social Clubs, 2 Restaurants, 1 Arts Venue, 1 Student Union, 1 Theatre, 1 Nightclub and 1 established festival—Focus Wales. The research revealed no Hotels, Holiday Camps, Arenas or Concert Halls featuring live music. Regarding the wider music ecosystem, the authority has 2 recording studios (Amp and Roc2) and no dedicated rehearsal studios.

Merthyr Tydfil (5493 people per venue) has 6 social clubs, 2 pubs,[6] 2 Arts Venues and 1 Festival – Merthyr Rising. Our research revealed no Arenas, Other, Concert Halls, Grassroot Music Venues, Theatres, Holiday Camps, Nightclubs, Hotels or Restaurants featuring live music. In terms of the wider music ecosystem, there are no recording studios and one dedicated rehearsal studio (Cabin Studios).

Neath Port Talbot (6016 people per venue) has 14 Pubs, 4 Social Clubs, 2 Other, 1 Theatre, 1 Arts Venue, 1 Restaurant and 1 Nightclub. The research revealed no Grassroot Music Venues, Hotels, Festivals, Arenas, Concert Halls or Holiday Camps featuring live music. In terms of the wider music ecosystem, the authority has 3 recording studios (Octagon, Oakwood. Church and Groupeze), with Groupeze doubling as a rehearsal studio and music tuition space.

Bridgend (6415 people per venue) has 6 Other, 5 pubs, 3 Restaurants, 3 Social Clubs, 2 Theatres, 2 Holiday Camps and 2 Festivals. The research did not identify any Grassroot Music Venues, Arenas, Concert Halls or Hotels featuring live music. In terms of the wider music ecosystem, there are two recording studios (Northstone and Underdog Recording) and no dedicated rehearsal studios.

Cardiff (7538 people per venue) has 8 Other, 7 Grassroot Music Venues (3 Small, 3 Medium, 1 Large), 6 Nightclubs, 4 Arts Venues, 5 Pubs, 5 Social Clubs, 3 Student Union Venues, 2 Festivals 1 Theatre, 1 Arena, 2 Concert Halls and 1 Hotel. The research did not identify any Restaurants or Holiday Camps featuring live music. In terms of the wider music ecosystem, the authority features 15 recording studios of varying sizes and 4 dedicated rehearsal spaces.

Newport (8571 people per venue) has 4 Pubs, 4 Arts Venues, 2 Restaurants, 2 Small Grassroot Music Venues (both small), 2 Hotels, 2 Social Clubs and 1 Other. The research did not identify any Theatres, Festivals, Arenas, Concert Halls, or Holiday Camps. In terms of the wider music ecology, the authority features 3 recording studios (One Louder Studios, Cobra Studios and Trinity) with One Louder Studios doubling as a rehearsal space.

Monmouthshire (8651 people per venue) has 3 Social Clubs, 2 Festivals, 1 Pub, 1 Restaurant, 1 Arts Venue, 1 Theatre and 1 Medium Sized Grassroots Music Venue. The research did not identify any Hotels, Other, Arenas, Concert Halls or Holiday Camps featuring live music. In terms of the wider music ecology, the authority features 5 Recording Studios (Monnow Valley, Up the Lane Recordings, Rockfield, Progrotech and Music Sync Tank), with Monnow Valley Studio positioning itself as a rehearsal facility also.

Blaenau Gwent (8753 people per venue) has 3 Festivals, 2 Social Clubs, 2 Pubs and 1 Arts Venue. The research did not reveal any Hotels, Restaurants, Theatres, Arenas, Concert Halls, Holiday Camps, Theatres or Grassroot Music Venues. In terms of the wider music ecology, the authority features three recording studios (Palm Studio, Leadersvale Studios and Unit 13 Recording Studio). Leadersvale offers residential facilities and Palm Studio doubles as a rehearsal space.

Rhondda Cynon Taf (8958 people per venue) has 13 Social Clubs, 4 Pubs, 3 Small Grassroot Venues, 3 Other, 2 Restaurants and 2 Theatres. The research did not identify any Hotels, Festivals, Arenas or Concert Halls featuring live music. In terms of the wider music ecosystem, the authority features 2 recording studios (Long Row Audio and Studio 54), with Studio 54 doubling as a rehearsal space.

Conway (9849 people per venue) has 3 Other, 2 Nightclubs, 2 Theatres, 2 Pub, 1 Festival and 1 Social Club. The research did not identify any Arenas, Concert Halls, Grassroot Music Venues, Arts Venues, Hotels, Restaurants or Holiday Camps. In terms of the wider music ecology, the authority features 3 Recording Studios (Orange Sound, Revelator and Acoustic Mastering and Mix) and no dedicated Rehearsal Spaces.

Isle of Anglesey (14088 people per venue) has 1 Festival, 1 Hotel, 1 Pub, 1 Other and 1 Arts Venue. Our research did not reveal any Concert Halls, Arenas, Grassroot Music Venues, Theatres, Social Clubs, or Holiday Camps featuring live music. In terms of the wider music ecosystem, the authority features 2 small recording studios (Stiwdio Pandy and Phoenix Recording Studios), with Stiwdio Pandy partnering Awen Records and Cyhoeddiadau Pandy Publishing. The research revealed no dedicated rehearsal studios.

Flintshire (15685 people per venue) has 4 Pubs, 2 Festivals, 1 Medium Grassroots Music Venue, 1 Theatre, 1 Other and 1 Restaurant. The research did not identify any Arts Venues, Nightclubs, Arenas, Concert Halls, Social Clubs or Holiday Camps featuring live music. In terms of the wider music ecosystem, the authority features 2 recording studios (Full of Joy Studios and Michael Clarke Studio), both of which also focus on additional business such as music tuition and guitar set ups. Our research revealed no dedicated rehearsal studios.

Torfaen (18966 people per venue) has 3 Social Clubs and 2 Pubs, making it technically the authority with the smallest and 'narrowest' set of venues. In terms of the wider music ecosystem, the authority features 2 small recording studios (Pinewood Audio and JC Studio, which also doubles as a rehearsal facility). There are no dedicated rehearsal facilities in the area.

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[6]One of which features a significant amount of live music – The New Crown.

Caerphilly (22716 people per venue) has 2 Social Clubs, 2 Hotels, 2 Other, 1 Festival and 1 Pub. In terms of the wider music ecology, the authority features 4 Recording Studios of various sizes (Redrock Studios, Shabby Road, Red and Black Studio and Snake Mountain) and 1 dedicated Rehearsal Studio (The Practice Pad) – although this does have a secondary music shop business.

Vale of Glamorgan (27059 people per venue) has 1 Holiday Camp, 1 Other, 1 Arts Venue, 1 Social Club and 1 Pub. In terms of the wider music ecology, the authority has a dedicated Rehearsal Room (The Green Rooms, which also doubles as a venue) and 2 Recording Studios (Hafod Mastering and Field Gate Studio).

METHODOLOGY

It is important to acknowledge that this research came with some methodological challenges, which limited the research team's capacity to gather more detailed data such as venue opening hours, capacities and personal contact details for managers. Despite often repeated attempts to reach venues by phone and survey, it was often not possible to make contact with a venue or speak to the most appropriate staff members. To circumnavigate this issue, it is hoped that once the map is published, venues will be able to update their data as and when appropriate, ensuring the map is regularly refreshed.

As the database of the map was developed, many venues were still in the process of reintroducing their live music offer 'post covid'. Although the map was checked and refined up to the point of publication, it is inevitable that some venues' live music offer would have recently been reintroduced. As indicated, any such venues can be added once the map is published.

Despite these issues, the data gathering for the digital map employed the following eleven stage methodology.

1

Typology of 15 music venue types formulated, to include: Theatre, Arts Venue, Pub, Small Grassroot, Medium Grassroot, Large Grassroot, Arena, Hotel, Restaurant, Social Club, Holiday Camp, Festival, Student Union, Nightclub, Other.

2

Initial list of Welsh music venues gathered via consultation with music publishers Sentric Music.[7] This list was then refined via a Google search to account for the impact of the pandemic.

3

Refined music venue list placed into a database and extended via implementing a Google search for each venue type in all of the 22 local authorities in Wales.

4

Initial discussion with Creative Wales to clarify the fields of the database and to ascertain which could be made publicly available, taking into consideration GDPR.

5

Research team begin the process of contacting venues by phone and survey if requested.

6

Recording Studios and Dedicated Rehearsal Studios added to the database, by searching each of the 22 local authorities in Wales.

7

Checking implemented to ensure that database of music venues, recording studios and dedicated rehearsal studios were current. [8]

8

Team of BA Music Business students from the University of South Wales check for additional venues, recording studios and dedicated rehearsal studios.

9

Database information uploaded into mapping software developed by Dr Craig Hamilton and checked for technical glitches and data accuracy.

10

Selected drafts of the online map shared with Creative Wales' for final feedback.

11

Map published.

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[7]See https://sentricmusic.com
[8]This was mainly implemented online, to ensure businesses were still operating. Due to time restrictions placed on members of the team – not all music venues were contacted by phone.

CONCLUSION

This mapping data will undoubtably open up as many questions as it provides answers, as venues, recording studios and rehearsal studios open and close, and indeed as some report their omission from the current map. However, despite the inevitable omissions and ongoing revisions/updates that will be required, this data does provide a comprehensive snapshot of live music, recording and dedicated rehearsal studio activity in Wales, enabling Creative Wales to see how venues are distributed nationally, facilitating conversation to implement investment into the music ecosystem. Via assisting conversations with music industry stakeholders, the map will also hopefully open up discussion regarding factors such as genre inclusivity, diversity, sustainability, potentials for strategic collaboration, the finer details of labelling venues and transport. As the map develops, it will also assist stakeholders such as music promoters and individual musicians to cost effectively plan tours; contact venues for work; not to mention enabling the general public to get a real sense of the range of venues in their locality.

Much consideration was given to the range of venue classifications included on the map, which was compromised to a certain extent by the number of distinguishable colours available in the mapping software. In an attempt to capture the full range of live music activity in Wales, the map not only includes grassroot venues, arenas and concert halls, but also venues such as hotels, restaurants, holiday camps and social clubs— establishments that often slip under the radar of public and political awareness but are an important means of employment and entertainment, even though they generally don't feature 'original' music.

It is important to highlight that church halls and many community buildings are not currently included on the map as stand-alone categories, so this may be something that Creative Wales want to expand upon in future.

Although the classifications of the venues 'speak for themselves', both Grassroot Music Venues and Nightclubs require some explanation, so this is outlined in the Appendix.

Of the 75 recording studios catalogued, 15 are centred in and around Cardiff, while many such as Rockfield (in Monmouthshire), Stiwdio Un (in Gwynedd), LTS (in Ceredigion) and Red Kite Studios (in Carmarthenshire) are positioned to take advantage of beautiful locations in the Welsh countryside. As was already known anecdotally, Wales has a very low number (7) of dedicated rehearsal studios. Although this number does not include the many premises where rehearsal activities take place informally (in pubs and church halls for example), nor indeed the recording studios that also include rehearsal spaces, it does indicate that support to facilitate more dedicated rehearsal spaces would be beneficial for the broader music eco system.

In conclusion, it is hoped that this map will be the first stage of mapping the wider music industries in Wales, although investment will have to be given in further developing the underpinning technology. Further discussion also needs to take place regarding the logistics of managing the map going forward, to ensure it is kept up to date and accurate.

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APPENDIX
EXPLANATION OF GRASSROOT MUSIC VENUES AND NIGHTCLUBS

Regarding Grassroot Music Venues, this research incorporated the classifications provided by the Music Venues Trust.[9]

This can be summarised as follows:

A The venue's raison d'être is the music it programmes
B It has an organisational focus on music.
C It takes risks with its programming, often at a financial cost
D It has an impact on the night time economy
E Has a stage and a PA System
F It employs personnel such as sound engineers, bookers, promoters, cashiers, stage managers and security guards

More specifically, the Music Venue Trust categorises its Grassroots Music Venues as follows, which have been incorporated throughout this research:

Small Grassroot Music Venue
• less than 350 capacity
• over 144 live music events per year, providing opportunities for more than 180 micro-businesses (bands)
• entry level musicians, some limited activity in established acts
• 3 to 10 direct FTE jobs (programming, lighting, sound, bar, security etc)
• significant number of unpaid roles/volunteers
• high running cost to capacity ratio
• little if any profit potential

Medium Grassroot Music Venue
• 351 to 650 capacity
• over 96 live music events per year, providing opportunities for more than 144 micro-businesses (bands)
• mix of new and established acts
• 5 to 15 direct FTE jobs (programming, lighting, sound, bar, security etc)
• some unpaid roles/volunteers
• medium to high running cost to capacity ratio
• propensity to programme non-live music (such as club nights) to support live music programme
• limited potential for profit

Large Grassroot Music Venue
• 651 plus capacity
• over 72 live music events per year, providing opportunities for more than 108 micro-businesses (bands) programme of mainly established acts
• 10 to 20 direct FTE jobs (programming, lighting, sound, bar, security etc)
• internships and apprenticeships
• may be profitable dependent upon external factors (location, additional uses, ownership)

The Nightclubs included on the map are those businesses which feature DJs that include an element of 'liveness' in their performances. This 'liveness' is exemplified in much of the worldwide success of Electronic Dance Music over the last 20 years, with celebrity DJs such as Fatboy Slim and David Guetta now regarded as performers in their own right. Consequently, DJ technology has grown exponentially, with digital mixers now capable of live loop creation, multiple effects and midi triggering, enabling DJs to remix original tracks during live performance. The venues featured on the map are part of this historical lineage.[10]

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