Mapping of the South African Live Music Circuit 2010

Conducted by: Moshito Music Conference & Exhibition
Supported by: MMINO South African-Norwegian Music Cooperation

November 2010

Table of Contents

Mapping of the South African Live Music Circuit

Conducted by: Moshito Music Conference & Exhibition
Supported by MMINO South African-Norwegian Music Cooperation
November 2010

1 Introduction

This mapping exercise aims to offer a preliminary “stocktake” as to the scale and scope of South Africas’ permanent live music circuit. Moshito (who conducted the Mapping) and MMINO (who funded it) intend that this modest venture can stimulate an understanding of this often-neglected “sub sector” of South Africa’s growing music sector and industry.

As the music industry internationally grapples with the challenges of globalization and new technology, the traditional separation between the realms of recorded product, and live performance are being questioned. In South Africa, our “live sector” is far less developed than the rapidly-growing recording industry[1]. Policy and legislation pertaining to recorded product and associated intellectual property matters have been reviewed, and there is ongoing and substantial engagement around issues such as piracy, local broadcast content, and needletime.

It is no surprise that businesses who invest in – and largely control – the recorded product, have a long term interest in meeting the challenges: stakeholders work with government to ensure that policy and legislation complies and interfaces with those of the recording industry internationally. Bi-lateral agreements and trade treaties necessitate that South Africa keeps apace with the rapid developments globally. South Africa’s recording industry is intertwined with the international recording industry, and in many respects, takes a global cue in framing its business and operating methods.

Conversely, live music is a haphazard beast. Irregular, seasonal and labour intensive, our “live music sector” is manifest through a series of occurrences at clubs, festivals, sportsgrounds, community centres and improvised venues. Ever-evolving, the sum of so many parts, it often defies logic and the neat business matrix enjoyed by its recording industry counterpart.
But live music performance is the bread and butter to many musicians, the research-and-development laboratory of audience tastes, and a staple of South Africa’s cultural and entertainment diet. We believe it has massive growth potential, and that given the challenges which record industry faces, “live” is already being eyed as the next big thing[2].

Our aim through this Mapping is to take a snapshot of South Africa’s live music circuit in 2010. We delineate as “circuit” the constituent parts which repeat or recur, which offer a core skeleton of stability to an otherwise amorphous sector.

We did not set out to *research* the live music sector, neither to quantify its economy or contribution to the fiscus. Our target was to map those venues and events which routinely stage

---

[1] Despite international trend towards crisis and contraction in the recording industry, South Africa reports growth.

[2] Faced with drops in record sales, record labels internationally have endeavoured to expand their contractual parameters to include live performance revenue and merchandising as part of so-called “360 degree contracts”, effectively attempting to move into the traditional terrain of artist managers and agents. [see “The Music Industry: A change of Tune” - The Economist, July 2007 pp64-5] In South Africa, where record companies offer little by way of artist development or tour support, it will be important that we understand the scale of investment and commitment which venues and festivals offer in the live music terrain.

live music, and annotate our mapping with the comments and observations we gleaned in the course of our investigation.

Ultimately, we have found it equally important to identify what we have *not* mapped, and to flag the sort of questions and considerations which we believe further work may address and then commence to analyse.

We hope that this modest mapping exercise may afford stakeholders and participants a preliminary insight into the state of our live music circuit, and the challenges it faces.

2 Why Map Live Music?

Music is recognized as amongst South Africa's richest cultural resources, and since the political transformation of 1994, there has been increasing acknowledgement of music's social and economic roles, with endeavours from both public and private sectors to nurture and grow our music sector.

Interventions and innovations in the post-1994 period have been fueled by agendas ranging from cultural reconstruction, through to economic sector growth.
Concurrent with these domestic transformational prerogatives, music - and especially its production and distribution – has undergone fundamental changes globally.

Thus the battle cries of cultural activists calling for a greater slice of local broadcast content, have found resonance with those businesses who trade in the intellectual property associated with music.

The bulk of studies and mentions of the "music industry" refer in fact, to the *recording* industry[3]. Since the recording industry has historically been the most formally-constituted element of the music world, and one which trades musical product internationally, it offers relatively accessible data for analysis. The recording industry is represented by articulate trade bodies – such as RISA and AIRCO – who input and engage in national and international forums. Research conducted in South Africa on the music sector includes

- The Cultural Industry Growth Strategy, The South African Music Industry Report (1998)
- The Music Industry Task Team Report and Recommendations, 2000
- KPMG report on Trends in the Music Sector
- Problem tree analysis of the Music Industry for HSRC Cultural Observatory
- YFM Case Study, Oct 2005
- Yired (2003) Kwaito Nation: An Industry Analysis
- The South African Music Industry: trends, analysis and questions (Karl Gostner, 2004/5)

---

[3] "Cultural Industry Growth Strategy: The South African Music Industry". Report to the Department of Arts, Culture, Science & Technology, November 1998. The report detailed 'Creators, Agents, Record Companies & Retail' as the 'industries' making up the 'music industry'.
"Spinning Around – The SA Music Industry in Transition". Randall Abrahams, HSRC Press 2003. The paper offers interesting insight into successes and failure in the recording industry. The live music sector is not featured.

Conversely, the live music sector is diverse in its components, often appearing as a haphazard array of activities rolling out on an ever-changing spatial terrain. Live music is so much more loosely structured, such that to designate it an "industry" serves to confuse matters. Reports and research repeatedly allude to the problems and challenges of studies in this terrain, yet seldom substantiate.

International research supports this and finds that there are new trends in live music which warrant further research. Live music is now understood to be in the long tail world[4] (except of course of old, established acts and one off sensations) with very few bands being able to fill large arenas or football stadiums with the market for live music fragmenting all the time as the rate of recording releases explodes (Wolf Trap Music Blog, Jan 2010). Increasingly though, live music is considered more in its own right as an income generator than as a publicity vehicle for CDs as in the past and thus a part of the music industry that requires research.
The loose structure of the live music sector is exacerbated by the numerous contradictions in the music business which are well known and experienced daily by musicians around the world (adapted from Frith, 2009)

- The music industry is a contract based business but most musicians never have contracts
- The music business is highly exploitative although most transactions are based on face-to-face goodwill
- The live music industry is highly regulated although it can appear at best chaotic and at worst criminal
- The industry is big business while the small scale, do it yourself promotion and live scene is the heart and soul for musicians

A key component of the live music sector relates to the role of the state. There is no doubt that its role in supporting and promoting live music continues to be significant. First, it has a regulatory role – from licensing of music, ensuring compliance of live music venues, to the use of alcohol in venues, safety and security, noise pollution and the like. Second, the state has a promotional role, investing in local music, subsidising certain genres of music and types of musical activity as well as venues. The role of the state in music spans the sectoral role of the importance of music as arts and culture to include tourism, youth policy, community development and multi-cultural development. Further research would need to investigate the extent and willingness of the South African government (across all tiers) to support and promote live music.

pic: Steve Gordon, Musicpics

Poster for the MACUFE festival in Mpumalanga, 2008

One of the challenges in mapping live music is the complexity of regulation that governs the live music

[4] Long tail refers to the concept describing the niche strategy of selling a large number of unique items in relatively small quantities – usually in addition to selling fewer popular items in large quantities. The Long Tail was popularized by Chris Anderson in an October 2004 *Wired* magazine article and later in his book *The Long Tail: Why the Future of Business Is Selling Less of More.*

circuit. It is in fact complex all over the world[5]. Tentative conclusions from the first year of the live music survey in the UK suggest that regulation is important in the following three areas: posters, licensing and 'criminal' activity:

A) Flyposting: the much relied on advertising of music gigs in a neighbourhood or city depends on posters advertising these gigs being plastered around. In the UK, many cities have made this illegal and/ or complicated. The attitude of local authorities is often the issue here with promoters noting that cities believe that to attract investments to their cities, the streets and walls need to be 'squeaky clean' so that poster boards get removed such as occurred in Sheffield. In Newcastle, the police are known to harass people who fly post and the Liverpool council actively takes action against flyposting. The case of Glasgow versus Edinburgh is instructive as the former local authorities' allocated official fly posting sites which are working well while Edinburgh's police are accused of harassing promoters doing fly posting.

Licensing of venues and the high level of regulation required: while this has less to do with the music itself, it has implications for promoters and venue owners wishing to host live music. Providing live music requires compliance with health and safety issues and the consumption of alcohol. Cloonan explains the implications of the 2003 Licensing Act for England and Wales according to which "the provision of live music is applied for at the same time as an alcohol license". A copy of this license then needs to be lodged with a number of different bodies from "the chief of police, the fire authority, the health and safety authority, the local planning authority, the environmental health authority, the body recognised as being responsible for protection of children from harm, and Inspectors of Weights and Measures (trading standards officers)". Further requirements include advertisings the events on the premises and in a local newspaper so that so called interested parties can make representations against to the local authority – no space to make representation for! Since its enforcement in 2004, the official feedback about this act is that it's been 'broadly neutral', while amongst promoters, venue owners and musicians, is that enforcement has led to a host of fines, restrictions and at worse, venue closures.

Despite the regulations discussed above, the live music is often considered the least regulated part of the music industries, bordering on the 'black economy'. Not only are some people throughout the decades considered to be of 'dubious' character but the live music sector always seemed to have a lot of cash floating through the system. The latter stems from the corruption linked to how many posters are put up, the number of tickets sold, merchandise, illicit or unofficial merchandise, sellers of tickets (touts) at exorbitant prices. Pink Floyd manager, Pete Jenner describes this as a 'dodgy' business to Cloonan: "Absolutely it's still dodgy. Any business which involves lots of cash is dodgy, How do you become successful in this business? Basically, if you can get away with not paying as much as you really ought to be paying, and underestimate your income for the take of the taxman, you can increase your profitability, That requires a certain level of deviousness, a certain ambiguity towards one's liability to the state and your client. The old-fashioned, do you deal with people in an honest way or a dishonest way? So the people, who deal in a dishonest way but can appear to be honest, do very well" (2009:32). The final part of this lack of regulation is related to royalties that are owed to songwriters for songs played in public. Promoters often don't sign off on the playlist at venues and festivals.

---

[5] In the fourth part of the articles written after the first year of the 'Analysing live music in the UK: findings one year into a three year research project'. Martin Cloonan noted three key areas the necessity of regulation; live music and the black economy and the impact of technology on ticketing. We want to expand on the first two areas as they relate to the South African context. As

In South Africa, role-players range from a few top-end promoters[6], to festival managers, club owners and cultural arts projects. All operating outside of the *recording* industry, these practitioners facilitate a groundswell of live music performance: the gigs, festivals, and cultural events where South Africans listen, play and dance to their music.

In South Africa, live music has received less policy or academic attention than recorded music, and where it has been a focus, it is most often than not, around regulation.

To look at South Africa's music industry without looking at the live circuit, is to exclude a key dimension. This mapping aims to look at the often-neglected Live Music sector, as manifest through a rudimentary circuit.

---

[6] Promoters are now the focus of a large research project in the UK on the live music sector. They are described as the catalyst for this sector- bringing together the artists and the venues.
Putting the promoter at the centre of the business of music provides a completely different understanding to that where the musical power structure is provided by the recording companies. As Frith says: "Promoters have both a different immediate sense of the problem of juggling with many interests at once (artists, managers, agents, venues, regulators, record companies, audiences) and a different long term understanding of music careers and audience needs – to look after an artist's starting out is to benefit from their market value when they become big stars: to look after his audience for this show is to ensure they come back for the next one" (2009:5).

3 Tabulating the Live Music Circuit

Before commencing mapping, it was necessary to tabulate the full spectrum of live music, so that we could narrow our focus on those elements which constitute a “circuit”.

Our terms of reference expressly used the word “circuit” to denote the permanent or recurrent performance platforms which exist in South Africa. These range from venue infrastructure which is in place year round, through to seasonal festivals which take place annually. The circuit is made up of venues, clubs, festivals and other performance platforms. Most important, the word “circuit” suggests movement, a level of permanence, longevity, and repeat-activity.

Our mapping thus prioritises recurrent or permanent music staging – “permanent features on the SA music scene and calendar”, which are the bedrock of the live music circuit. As much as an artist needs to practice, rehearse and refine their performance, so too, a venue or festival needs to develop its infrastructure, production and marketing capacities if it is to retain – and hopefully build its audience.

Activities which recur, lend themselves to refinement. It is reasonable to assume that these permanent building blocks of the live music circuit have some element of success to their formula, and a proven sustainability, notwithstanding the many challenges which practitioners report.

The conglomeration of these disparate but recurring performance platforms present musicians – and their audience – with a “circuit”.

The notion of a “circuit” also has further relevance and value when understood from the perspective of its practitioners and users:

3.1 A “circuit” for performers

Musicians who have attained a semi-professional or professional stature try to plan their live performance activity, informed by the performance opportunities available. Innovative or entrepreneurial musical groups and their representatives will evaluate which venues or festivals they should target, such as are suited to their repertoire and their pricepoint. It is the “permanent” features which allow planning, but not the “one off” opportunities. International research shows that the decision to stage live music continues to be driven by economic reasons from customer demand, cost efficiency to whether there is a fit with the nature of the business and with the practical considerations of the venue.

3.2 A “circuit” for the audience

South Africa offers a diversity of audiences, and musical enthusiasts know that particular venues or festivals are likely to serve up music within the scope of their interest, likes and tastes. Audiences expect that the venues and festivals which they frequent will rotate the acts which they present or “bill”. Even from this “static” perspective, of say, a music lover in Durban, there is the expectation that year on year, there will be some “flow” of artists, drawing on the pool of performers who are active on the circuit.

3.3 A “circuit” for marketing

Marketing of our live music scene as a whole (rather than of special promotions), is premised on the existence of a stable circuit. This is especially true for “destination marketing”, where tour operators and tourism authorities wish to leverage the value of the South African music experience: they need to point prospective and actual visitors as to where they can find and experience our music on stage[7].

Established “landmark” festivals such as the Cape Town International Jazz Festival offer strong selling points for particular dates. South Africa needs more dates, and more venues so that a comprehensive, year round live circuit can be marketed at home and abroad.

3.4 Exclusions from the mapping: One-off events, Institutional Performances

3.4.1 One-off events

Of course there are many one-off events, concerts and promotions. Music performance for the launch of a new product, the corporate dinner for a financial services company, state functions or “protocol” performances concurrent government officials or foreign embassies or the support act slot when a visiting international star act tours South Africa.

These, and other “ad hoc” activities present significant income opportunity for performers, but by their very nature, are not sustained platforms. A powerful recent example of large-scale “ad hoc” activity can be found in the many performances which accompanied the recent World Cup. There were Opening and Closing ceremonies, the official fan park performances, and a host of semi, and unofficial performances.

For purposes of mapping the *permanent* live music circuit in South Africa, one-off events cannot be tabulated. The World Cup gigs happened in June/July 2010, on one-off budgets, and do not recur in 2011[8].

3.4.2 Government-initiated concerts on National Days

South Africa’s annual roster of public holidays anchor a host of one-off concerts each year. Whichever tier of government presents or facilitates, few of these events have recurrent management, direction or infrastructure. They thus do not qualify as permanent features of our music circuit, notwithstanding the fact that they often command sizeable budgets.

We can only map the routine and recurring. These concerts are mentioned as part of the study, but not “mapped”.


pic: Eugene Arries, Musicpics

Mafikizolo on stage

[7] As an example, see the overview of annual “Festivals” on the tourism website www.stayinsa.co.za , and on www.music.org.za music website. These listings are distinct from “gig listings” which appear in the entertainment pages. Tourism market requires focus on annual events.

[8] With respect the 2010 World Cup, correspondents have voiced the opinion that the music and entertainment components concurrent with the tournament fell far short of expectations. Philip Beardwood of Gearhouse confirms that “The international focus and business potential is great, but the fact is, the tournament wasn’t the money-making spree that people thought it would be. The two months post World Cup have been low. Budgets have been spent.” [p 9, The Event, November 2010]

3.4.3 Other "Exclusions" from the mapping

We similarly excluded from the 2010 mapping :

- the in-house performances of institutions such as : orchestras, educational institutions.
- Volunteer-based & religious entities such as : field bands, choirs
- Large scale commercial promotions, such as incoming tours of top-selling international artists.
- Residency performances, where the same band or musician performs for a protracted residency.
- Cabaret-type performances, musicals and opera
- "Festivals" where music is a minor feature of ancillary entertainment, and an advertised billing or lineup of music is not the primary marketing point.
- The shows or festivals which South African performers engage in *outside* of our national boundaries.

4 Mapping Methodology

During September and October 2010 we compiled a listing of known venues and festivals for each province. This first phase was based on internet research, and augmented through enquiries with practitioners active on the live music circuit.

The team then proceeded to telephonically verify the contacts and operational status of the venues and festivals on the preliminary listing: most of the web-based contact information was out of date.

Following initial telephonic approaches, we followed up by presenting a self-administered questionnaire (Appendix 1) which was either emailed or faxed to the respondent.

As we soon found that the response rate was low, we proceeded to follow through and conduct telephone or face-to-face interviews. This too, proved tedious, and confirms the experience of studies internationally, which point to the challenges of researching practitioners in the cultural sector[9].

Non-return can primarily be attributed to pressure of time on the part of respondents: the vast majority expressed willingness to participate, but needed much prompting. A minority – mainly of smaller venues - were reluctant to participate, especially with respect questions about their business operations[10].

In order to capture information coherently (whether from the questionnaires returned, or when conducting interviews), we prepared a data set (Appendix 2), with provision to record as many of the following <u>key parameters</u> as possible:

- Venue or Festival Location
- Music Genre
- Target Audience(s)
- Venue/ Facility type and capacity
- Programme Frequency (eg. night daily weekly annually)
- Do venues double up as rehearsal spaces
- Whether any sponsoring or funding
- Types of challenges
- Relationship with other venues/ festivals (eg. circuiting artists)

Where possible, we explored further, to try to ascertain <u>supplementary parameters</u>, which we believed would offer some insight into the business models being used. Our endeavour to ascertain this supplementary information was prompted by international studies which show that a sizeable portion of transactions in the live music sector are conducted in cash. The hand-to-mouth operation, especially of smaller venues is a factor which confounds studies and understanding to many outsiders.

- Trading entity involved (eg. whether business or NGO)
- Existence of liquor License or not
- Method of payment for artists (eg. door deals, flat rate)

[9] Cultural practitioners and entrepreneurs, especially in the entertainment sectors, do *not* work 9 to 5, and are seldom office based.

[10] Our experiences with responsiveness, and respondent buy-in to the Mapping are covered in the "recommendations" section.

- Existence of SAMRO license or not
- Whether venues / festival accepts credit cards

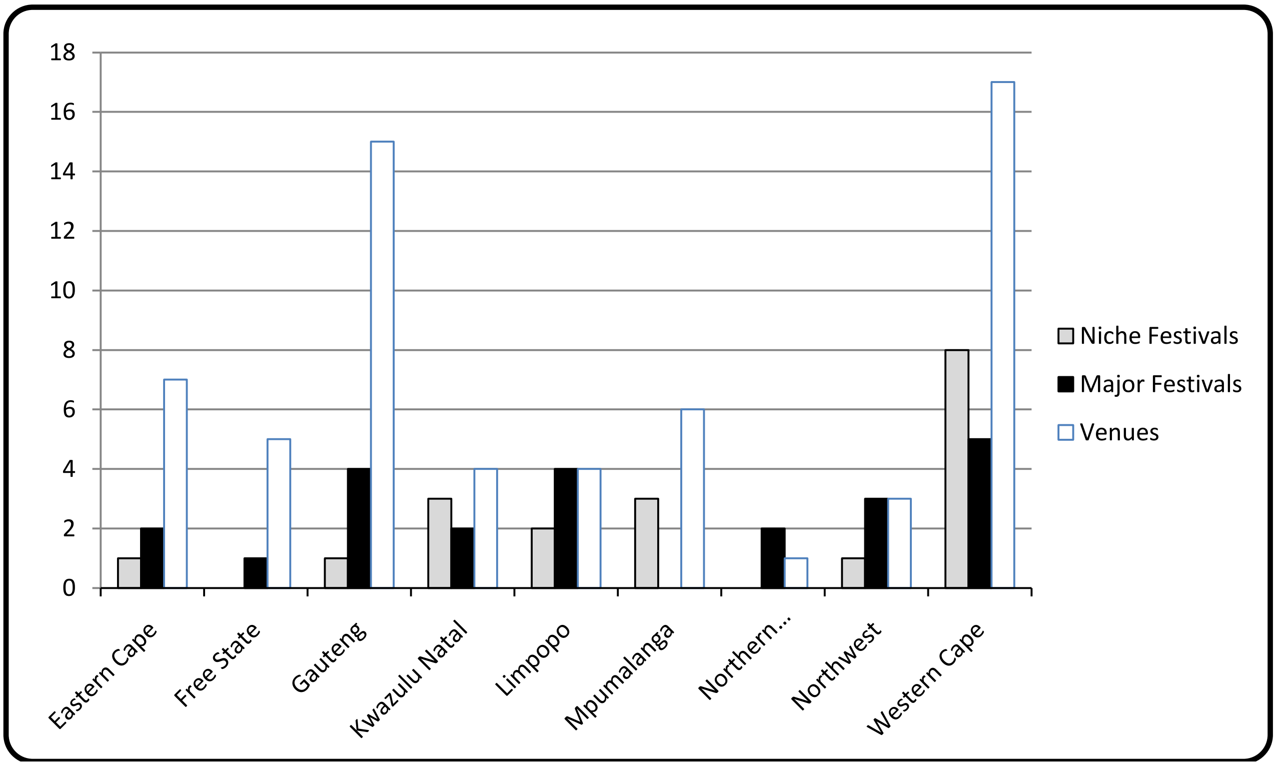
We also spoke with other practitioners – including musicians, event managers, artist representatives – to cross-check which elements of the circuit they had interacted with during 2010. Although these practitioners may be classed as "respondents", they are not enumerated for our primary purpose of mapping of the live music circuit.

5 What we found - The Numbers

We mapped a total of 43 Festivals and 62 venues as permanent features on the South African live music circuit as at November 2010.

5.1 Provincial Distribution of the live music circuit mapped

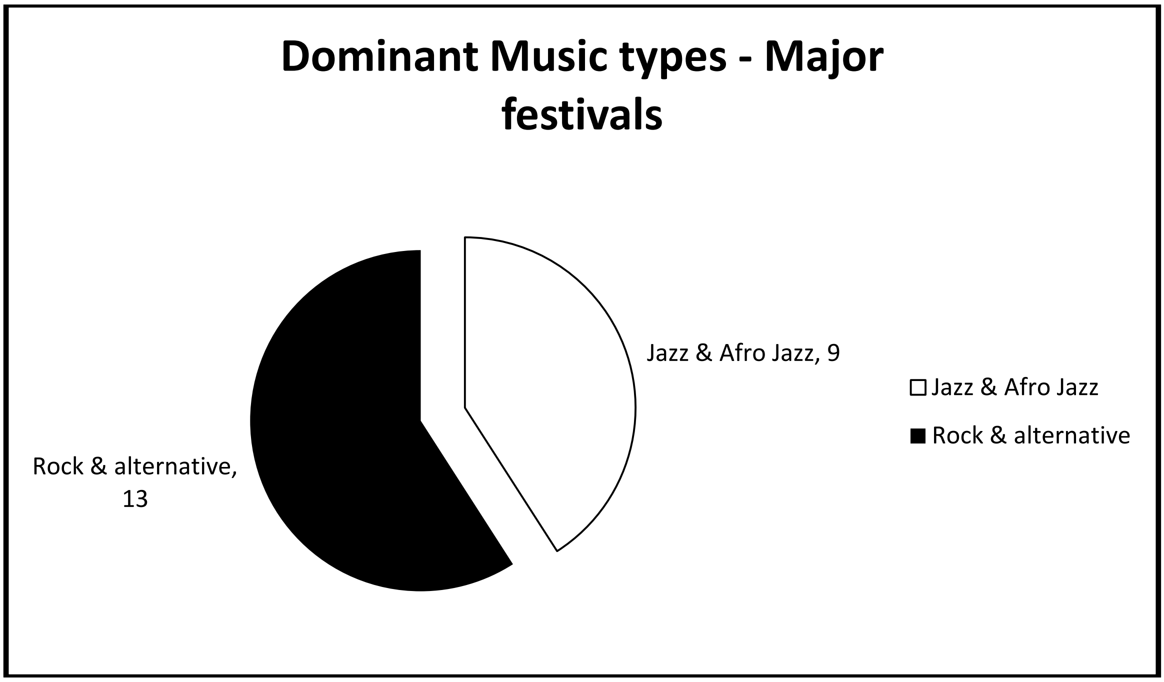
The provincial distribution showed a strong weighting of live music activity in Gauteng and the Western Cape, with Northwest, Northern Cape and Free State sadly lacking.



5.2 Content by Music Type or Genre

On the basis of respondents who provided an indication of the primary music genre or music type for the major festivals, we recorded nine which detailed "jazz or African jazz" as the primary genre, and 13 which had "rock or alternative" as the primary genre.

The genre-labels are broad[11], for example, many respondents use the term "jazz" to encompass programming of "world music" and "afro jazz". The major "jazz" festivals also feature the leading kwaito acts[12], certainly those which have configured with a full live band stage act.

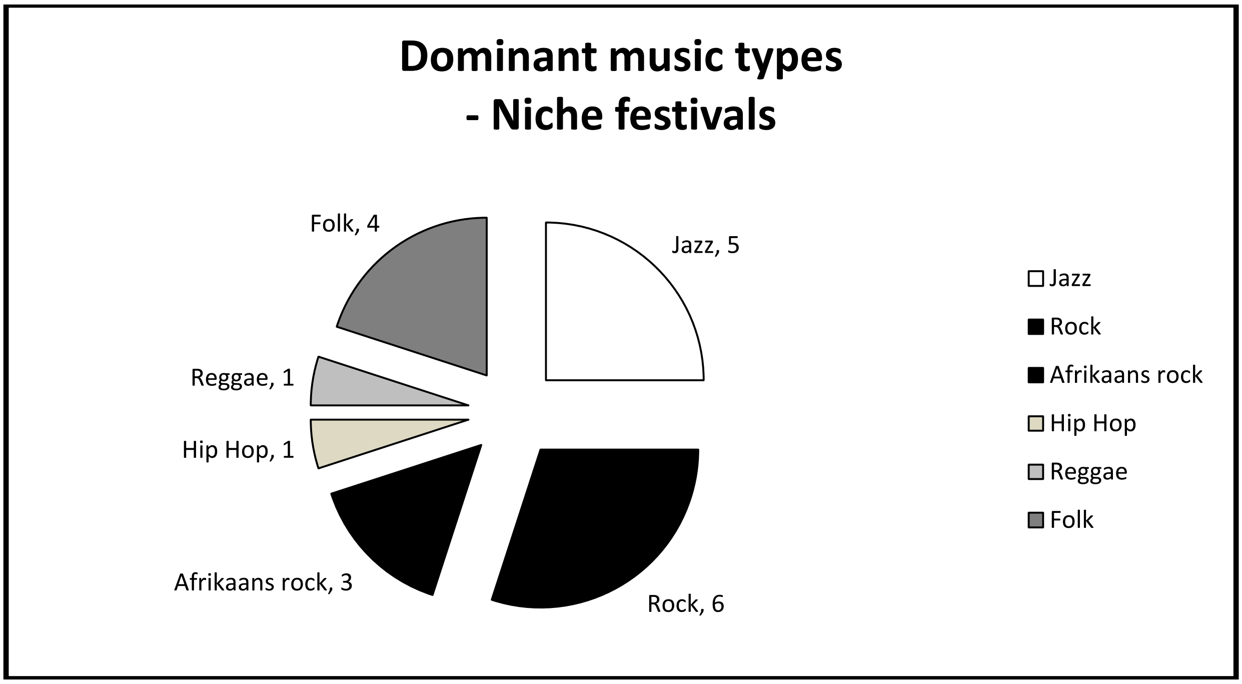


As we came to tabulate data captured, it became clear that the notions of "genre" and "music type" are incredibly flexible in South Africa. We reflect comments in this regard in the "*Observations and Trends*" section.

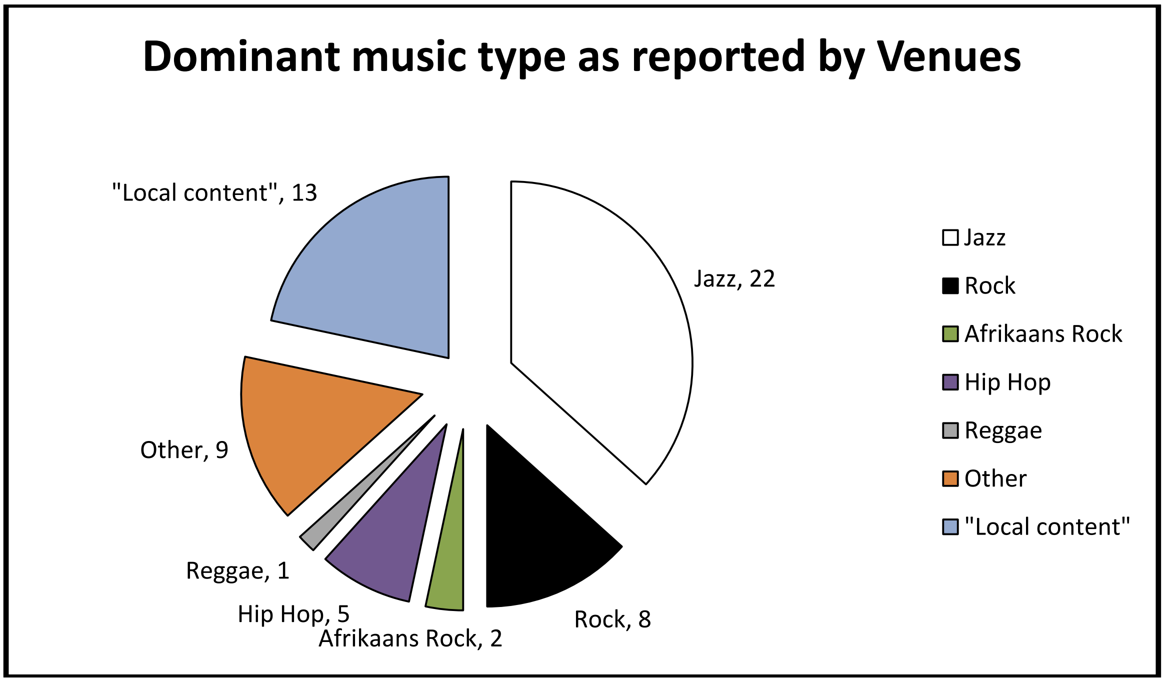
---

[11] "Afrikaans" is not a useful denotation of "genre". Similarly, whilst "gospel" may command the largest sector of sales, how do we differentiate between "gospel rock", "gospel R 'n B" or "African gospel"? Some venues which rotate their content simply used "local content" in response.

[12] Given the dominance of kwaito in our local music market and on radio, it is maybe surprising that this genre has not featured prominently in our mapping. One explanation is that the 2010 mapping does not include dj-driven events, and notwithstanding the fact that kwaito is performed at venues and venues that are rigged for live, these venues and festivals understand the broad term "jazz" to designate their primary genre.



Dominant music types
- Niche festivals
Folk, 4
Jazz, 5
Reggae, 1
Hip Hop, 1
Afrikaans rock, 3
Rock, 6
Jazz
Rock
Afrikaans rock
Hip Hop
Reggae
Folk



Dominant music type as reported by Venues
"Local content", 13
Jazz, 22
Other, 9
Reggae, 1
Hip Hop, 5
Afrikaans Rock, 2
Rock, 8
Jazz
Rock
Afrikaans Rock
Hip Hop
Reggae
Other
"Local content"

6 What we Heard – Respondents' comments and quotables

The array of comments offer some perspectives on the live music circuit which we mapped during 2010. Unless otherwise attributed, the quotes were gathered by the Moshito mapping team.

"There are no live venues anymore in Durban."

- Artist Madala Kunene, Maskanda music icon, commenting on the state of live music, and the challenges posed by kwaito and house music.

"It's party time again at Katzy's, one of the swankiest venues in South Africa and the haunt of celebrities, politicians and some of the richest businessmen on the continent. 'They arrive here in their Lamborghinis, Maseratis and Ferraris', laughs club manager Brett Mulder. 'And with the most beautiful women you'll ever see."

- Writer Darren Taylor, in VOA news, describes upmarket Rosebank music venue

"When others graduate from university there are jobs in their field.Without a circuit, where do music graduates fit in? Townships need live music venues."

- Promoter Peter Tladi, Joy of Jazz and T-Musicman

"We give performers the door takings, and charge them a flat rate for the sound engineer (even if they have their own, as we have had our equipment damaged in the past). All we ask… is that they promote their gigs and print their own posters. A lot of them do, while many are not prepared to make the effort."

- Neil Van Vuuren, Obz Café, Cape Town

"There are many good artists in this country, government and private sector need to find ways to make music/culture thrive…"

- Mandie Van Der Spuy, Standard Bank Arts Sponsorships.

"Just like the government supports sports with big budgets, we are asking the government to 'make the circle bigger'. They must share those big budgets which they spend on National Days on a few artists. They must spread it through the system. If needs be, they should pay the small clubs so that they can pay us a decent wage. Just for a little while! People love South African music, both locally and internationally. South African music can also be big business."

- Musicians Herbie, Khethi, Mdudzi & Pebbles, Joburg Oct 2010.

"Despite the venue's history, both on a musical and political level, we receive very little support from local or provincial government structures. Petty by-laws and red tape hinder us in promoting and developing live music and the music industry as a whole."

- Neil Comfort, Rainbow Restaurant & Jazz Club, Pinetown, KZN

"From an economic, tourism and cultural point of view, the event is important not only for the Western Cape, but for the country as a whole. The Jazz Festival is often overlooked when thinking of the high-earning events we host, but these numbers confirm that it is right up there with the best. I want to congratulate the organisers on a successful event".

- Western Cape MEC for Finance, Economic Development and Tourism, Alan Winde, commenting on findings that CT International Jazz Fest contributed 'more than R475million to the economy of Cape Town & the Western Cape.

7 Observations and Trends

A snapshot of the live music circuit at November 2010 reveals a weak and underdeveloped live music circuit when it comes to permanent, dedicated and equipped music venues that can present top national acts.

However we found a healthy distribution of regular live music performance at smaller venues, including restaurants, bars and clubs. The bulk of the venues mapped accommodate an audience of 200 people or less. Respondents – and especially musicians and promoters – bemoaned this fact. There is clearly a shortage of equipped, middle-size venues that can accommodate a full band plus an audience in the 800 – 1500 person range – a key size category for financial break-even when hosting an out-of-town act.

Jeff Maluleke performs at Arts Alive, Gauteng 2002

7.1 Major Established Music Festivals

Strong permanent features of the music circuit include the high profile and successful annual festivals in urban centres such as Cape Town, Johannesburg, Grahamstown, and Tshwane.

Notable amongst the "Major Festivals" are Joy of Jazz and Arts Alive (Joburg, Gauteng), Tribute Festival (Tshwane, Gauteng), Cape Town International Jazz Festival (Western Cape), Oppikoppie (Northam, Limpopo), Macufe (Bloemfontein, Free State), and the National Arts Festival (Grahamstown, Eastern Cape).

Most of these festivals have been running for at least eight years, and all draw on a mix of government funding and commercial sponsorship towards their operating costs.

Bongo Maffin onstage at the Tribute Concert, Moretele Park, Tshwane 2006

They typically include a strong jazz and instrumental lineup, and all of them include national and international musicians on their billing. Both Cape Town International Jazz Festival, and Joy of Jazz have television media partners, with the result that their media footprints extend beyond their local audience.

pic: Steve Gordon, Musicpics

Freshlyground onstage at Diamonds & Dorings Festival, Free State

Other major festivals include Diamonds & Dorings (Northern Cape), and Aardklop (Northwest Province).
Awesome Africa (KZN) has not experienced major growth, and the flagship Mpumalanga Arts & Culture Festival – MACFEST was not staged in 2010.

7.2 Smaller Festivals & Niche Festivals

These are important and established festivals, which by virtue of their location, or select genre, command a smaller or niche audience.

Examples include the long-running Splashy Fen (Underberg, KZN), Klein Karoo (Outdshoorn, Western Cape), Cape Town Festival (W. Cape), Woodstock Festival (Hartbeeshoek, Northwest), Rocking The Daisies (Darling, Western Cape), Afrikaanse Music Festival (Vredendal, W. Cape), Uplands Festival (White River, Mpumalanga), Mapungubwe Arts & Culture Festival (Polokwane, Limpopo)[13].

Niche music festivals include for example, an annual reggae festival in the Cape Peninsula township of Ocean View.

7.3 Major growth Area – Rock & Alternative

Notable is the growth in the "rock" and "alternative" music sectors. These have traditionally been the preferred music of white youth (and especially Afrikaans youth), although the audience now starts to evolve beyond that narrow definition.

Associated with this audience, we find a host of venues, and private-sector driven festivals.

The ventures of Oppikoppie set the benchmark, initiating concerts and "natural environment" locations. Festival often operate on the concept of a "getaway" weekend, much as the famous – if muddier – Glastonbury Festival in the UK. Venues typically include farms and camping sites, with wine estates increasingly hosting smaller, weekly live music shows as a means to draw traffic.

pic: Steve Gordon steve@music.org.za, Musicpics

Elsewhere, "Rocking The Daisies" (W.Cape) has proven highly successful in its first three years.

---

[13] Substantial growth in scale for Mapungubwe, which lists a major lineup at time of writing. If successful, this provincial-government driven festival will move well beyond the "niche" category.

pic: Eugene Arries, Musicpics

Chris Chameleon onstage at Spier wine estate, Western Cape 2006

The market is an interesting and well resourced one. As always, it is challenging to "ring fence" an audience or music sector. It is notable that whilst this "sector" was historically bounded by a more narrow array of music genres, the promoters increasingly diversify repertoire with African acts and electronic often represented.

Shows are generally well marketed, produced and presented. They have dynamic internet presence, and often utilize electronic ticketing.

7.4 Genre, style and audience changes

Our mapping attempted to include details of the predominant musical genres for festivals and venues. Genre-labels are subjective, so the first challenge that became apparent was the use of the word "jazz". The common usage extends way beyond the narrow designation of "improvised" music, Artists and promoters are survivors, so if "jazz" is deemed the saleable label, they will wield that label. The converse holds equally true: if "jazz" is considered a music for old people, younger jazz musicians will shy away from that label in their choice of self-description.

Even if research maps our live music circuit by an agreed set of music types and genres, the music and audience are constantly evolving. For example, Kwaito – probably the biggest music to emerge over the past decade – was seldom detailed as a "genre" by live music festivals and venues. Instead, we found elements of kwaito moving in two distinct directions as this generation of performers (and their audience) matured. On the one hand, there was a flow into house and the electronic realm, and on the others, a restyling closer to afro pop and afro-jazz (eg. Malaika, Bongo Maffin).

Other "genre changes" and "new categories" include the music of immigrants, such as the DRC or Zimbabwean community in South Africa. The collaboration of immigrants with SA-born musicians paves the way for new African fusions.

7.5 Spatial & Seasonal Distribution

Festivals – included locations in cities, towns and on private farms throughout the country.
Venues – were mostly in the major cities, with few township venues. There remain clear racial divides, which are discussed further below[14].

Mapped by province, the spatial distribution of live music revealed a paucity of permanent venues in the Northern Cape and Free State.

Festivals are seasonal, and like anywhere in the world, often schedule to coincide with public holidays. The vast majority of venues only present live music on Friday and Saturday nights, or the

[14] For example, in the Western Cape, not one of the music venues was located in a township. Most venues served the tourist and backpacker market, and were concentrated in urban areas.

evening before a public holiday. Some venues[15] present djs, film or other artforms on the "off nights".

The live music sector is impacted by disposable income, and many promoters and venues steer away from the middle of the month when patrons' cash is tight.

7.6 Apartheid's Legacy

Live music performance is spatially bound, and given that most South Africans still live in areas which were defined by the Group Areas Act, we face challenges when it comes to transport and movement between the historic "population groups".

Even the crudest level of mapping reveals that townships – where the majority of South Africans live – are hopelessly under serviced when it comes to music venues and festivals. With the notable exception of Moretele Park (Mamelodi, Tshwane), there are few large venues for hire in townships which are suited to safe, secure music staging.

Central-city festivals & venues attract diverse audiences, but transport hurdles and price point typically exclude the majority of South Africans from being able to attend.

Whilst the mapping did not set out to compile demographics, the tables pertaining to genre / music type are uncanny insofar as they accurately reflect the divide in resources, and the manner in which different sectors of our society pursue and present music on the live circuit.

Our charting of "Dominant music types / Major Festivals " on page 13, shows that there are 9 major "jazz and afro jazz festivals", as to 13 major "Rock and Alternative" festivals. Significantly the majority in the first category are driven with significant public sector resources, whilst the latter are, for most, sponsor and private sector initiatives.

We record this observation, and suggest that a future mapping may include demographics and economic indices. The gap in resources (both for practitioners, and audiences) remains massive.

The Moshito research team gained the impression that we have two parallel, and gradually overlapping live music circuits when measured by audience: One mainly black and one mainly white. Performers circuit and transcend these barriers, but the audiences are seldom able to.

Both Economic and social development prerogatives prompt us to flag this very real legacy of Apartheid.

7.7 Dedicated live music venues

We only identified a handful of music venues equipped and ready to host a rotation of bands. Foremost amongst these were the Bassline and OST's (Newtown Joburg); the Rainbow Restaurant & Jazz Club (Pinetown, KZN), The Assembly (Cape Town), Westend (Rylands, Cape Town, Western Cape) and Hanover Street (Thornton, Cape Town, Western Cape).

---

[15] The Obz café in Cape Town has a seven-nights-a-week programme, of which Thursdays, Fridays and Saturdays include music. Other slots range from Documentary screenings, through to open Microphone Sessions, Poetry/Spoken Word, Shakespeare Unplugged, and Comedy.

By “dedicated live music venue” we understand a space which is permanently configured with a stage, PA system, core backline, monitors and lights. Such venues also have a management, staff and operational mode that is specialized and attuned to dealing with and presenting live music.

It should be noted that even the handful of dedicated music venues, fell far short of the technical and backstage production infrastructure as found at the flagship annual festivals.

Dedicated live music venues are in critically short supply on the South African circuit. Owner operators consistently reported the marginality of their businesses,

7.8 Sponsorship

The major private sector cash sponsors of live included banks and financial services, cellular companies, and liquor brands. Standard Bank is especially active in live music, and has been a consistent sponsor of key annual festivals – CT Intnl Jazz Fest, Joy of Jazz, and the National Arts festival. Old Mutual is another prominent sponsor.

Broadcasters and other “media partners” seldom provide cash input to budget, but typically add value and leverage brand exposure through trade exchanges around promotion, production or broadcasts.

Smaller venues struggled to attract sponsors, which gravitated towards the larger, annual festivals which offered maximum exposure and marketing opportunity. The exception was the liquor / beverage sector, which offered ‘trade exchange’ and product samples to smaller venues.

7.9 Funding

We understand “funding” as financial subsidy or similar support, typically provided with the intention of enabling and stimulating cultural activity. The array of funders range from government (all tiers) through to foreign cultural institutions.

Pro Helvetia, British Council, IFAS and MMINO are the foreign institutions most consistently involved in music. Most actively support cultural exchange, often guided by bilateral cultural agreements. For example, they will support the travel and subsidize fees of their nationals, thus enabling their participation in activity in South Africa. Several of the agencies invite South Africans to apply for funding, but MMINO is the only dedicated vehicle which has music as its focal point.

Many respondents commented on the absence of support for smaller venues, and contended that funders – especially government – seemed to prefer to splash out large sums on a handful of big, seasonal events, rather than support the less glamorous year-round activity of music venues.

pic: Eugene Arries, Musicpics

Phuzukhemisi at Mofolo Park, Soweto at Loxion Live show Reconciliation Day 2010.

Most funding policies precluded private “for profit” entities from applying, a factor which limits the support and growth of the many small venues, notwithstanding the very dedicated nurturing role that small venues play.

7.10 Marketing, Ticketing and Artist Deals

Owing to a history of failed promotions, or so called “no-shows”, South Africans have, until recently, preferred to buy tickets at the gate. The past ten years have witnessed a steady growth of a pre-sales culture, with promoters and venues often offering discount to advance purchasers.

Venues and festivals mapped as part of the live circuit are permanent items, and thus command some goodwill from loyal audiences. Moreover, as they have built their profile or brand, they attain sell-out shows on some nights, and prospective patrons move towards pre-sales to ensure that they can secure tickets.

Encouraging the pre-sales culture is an important element in growing the live music circuit. It is similarly important for visitors, who wish to purchase advance tickets online. Many practitioners explained that security considerations mitigated against cash handling. It is interesting that whereas the live music circuit has historically been considered “cash heavy”, South Africans are moving towards online models.

Artist deals varied greatly by the context (festival or venue), and of course the market position & currency of the artist:

- Stronger acts, especially those with a national profile, contract performances at a flat rate for large (normally outdoor) festivals, and usually a reduced rate for smaller festivals or indoor venues.
- Emerging acts would accept lesser flat rates for high profile festivals, where the benefit of visibility and profile secured was often deemed greater priority than revenue.
- Smaller venues found it impossible to engage / present top national acts unless a special promotion / sponsor or event funder was involved.
- Smaller venues often engaged performers on a door deal (ie. venue would rely on bar income, and do a percentage split with performers from the door income).

On the whole, there is a tendency that the larger venues and festivals operate within a formal economy, whereas for the smaller venues, while their bar/restaurant departments are “formal”, the live music dimension is often cash-based.

The 2010 Live Music Circuit Mapping did not include any documenting of ticket prices or artist fees.

8 Recommendations towards further mapping and studies

8.1 Broadening the Mapping

Our 2010 mapping only uncovers the tip of the iceberg. We realize that a lot remains out of sight.

The data sets we used for our 2010 Mapping proved ambitious, but we believe them to be realistic. Some of the areas excluded from the 2010 Mapping should be brought on board.

Whilst the 2010 Mapping set out simply to "map" and quantify, we see it as a natural progression that further elements of research and analysis be anticipated.

8.2 Economic Data - Mapping

While we currently have no economic data, consideration should be given as to whether - and how – this important dimension might be added to future mapping:

Some simple examples include:

- Ticket pricing
- Use of ticketing bureaus (eg. Computicket)
- Ownership of venues
- Investment in PA and similar infrastructure, and associated tax benefits.
- Tax onus and compliance – essential for promoters, not for small venues.
- For the major festivals, where public funds are involved, there is a level of financial accountability, so that a higher proportion of analysis may be applied to these events, than for a simple private sector event.

8.3 Economic factors - Research

The notion of "externalities" is understood as typical to most cultural industries, ie., that the stimulus of activity such as live music creates a value for the economy and society, which is "external" to the core transaction.

A pertinent and instructive example, is the Cape Town International Jazz Festival, who have strongly positioned the festival as a stimulant for tourism, a generator of jobs, and thereby argued that the "externalities" to the direct transactions which they themselves engage, bring benefit to the economy.

pic: Steve Gordon, Musicpics

Jimmy Dludlu & Ivan Mazuse at Cape Town International Jazz Fest 2008

Computing and extrapolating such benefits is always a challenge, however a 2010 study – including survey - conducted by the University of the North-West[16] reported that "For the music industry, the impact of the festival on production is approximately R112 million,

[16] "Profile of Visitors and Economic Impact of the Cape Town International Jazz Festival 2010" – Institute for Tourism & Leisure Studies, North-West University, Potchefstroom Campus, 2010.

representing the value of the festival to the economy of the Western Cape. Through labour income multipliers the impact increases to approximately R461 million." Further extrapolations showed additional value contributed towards the country's GDP.

Capturing, computing and presenting similar data about the SA live music circuit as a whole will be even more challenging, but represents data, which can serve as a powerful motivator to policy makers, especially those in the economic clusters.

8.4 Respondent buy-in

It is essential that practitioners come to see value of research in this area, so that they are inclined to submit to regular, and more detailed mapping. Presenting and publishing a subset of mapping data in the form of an annual Listing or Database is a tangible example. If mapping of live music is sustained, practitioners could also be acknowledged[17].

8.5 Samro

Samro is a stakeholder in the live music circuit, and it is suggested that the organization might play an active and ongoing role, supporting further and future mapping and research.

Inter alia, partnering with Samro would allow:

- Publishers and creators to deepen their understanding as to the import of live music circuit and its growth.
- At a practical level, Since SAMRO captures the audience size for all licensed venues, this and similar data may be shared with live music circuit researchers.
- Many venues pay SAMRO license fees, but few return accurate log sheets such as would allow accurate disbursals to rights holders. Finding solutions to this end may be facilitated within the framework of longer term research and mapping.
- Contact with practitioners in the live music sector should be of value to SAMRO, who do not have direct access, except in the context of license fees.
- SAMRO derives revenue from the live music circuit, and has a direct interest in assisting nurturing the circuit, and finding creative ways in which to incentivize a "best practice" and culture of respecting intellectual property rights.

8.6 Research team

It is important that we identify a reference person in EACH province for future mapping. Our 2010 team members were primarily Gauteng and W. Cape based.

8.7 Other Organizations

Other organizations involved in live music, such as the South African Music Promoters Association (SAMPA), will hopefully be a natural partner to further research. Unfortunately, during 2010, senior

---

[17] The South African Music Awards (SAMA's) are currently administered by RISA. If performers and producers of records can be acknowledged, why not venues, festivals or their producers? Note that the TPSA (Technical Services Association) convenes annual awards, for categories of live event technical services, such as "Sound Engineer of the Year" and "Best Technical Staging Venue".

office bearers were engaged in disputes. While we spoke to individual promoters, the SAMPA website was offline, and we did not rely on SAMPA as a resource for the 2010 mapping exercise.

8.8 The music circuit beyond South Africa's national borders

The circuit which our musicians and professionals engage in, routinely includes neighbouring states, and of course, travels and live performance abroad. Further studies should identify and map these realms of activity. A starting point would be those festivals and venues in neighbouring states and in the SADC region, which have operated consistently in the previous three years.

9 Conclusion

The 2010 Mapping exercise offers a snapshot, and an initial view of South Africa's live music circuit. The exercise was ambitious, and entailed tackling an under-researched area with modest resources.

While much is made and proclaimed about our country's music, the live sector (and circuit) are weak, and underdeveloped by comparison to the recording sector.

Given international trends which show the ascendancy of live music performance, it is imperative that South African stakeholders prepare and position to strengthen the live circuit, so that we can meet the challenges associated with growing it. Mapping is a first step, a process which must continue and broaden into research. This is essential so that interventions, support, and incentives can be framed and guided from an informed position.

The live music circuit is important for both economic and cultural reasons. As with so many other aspects of our society, it is still heavily burdened by the legacy of Apartheid. The manifestations of this legacy are real and tangible: they are reflected in the distribution of live music infrastructure, the skills, resources, and audiences which make up our music circuit. They warrant research, so that they can be understood, and work focused on redress can commence.

The Moshito Mapping team suggest that annual mapping be conducted, so that growth and trends can be measured, and a clearer picture can be formulated. The focus, scale and scope of the mapping should be augmented, and supplemented with detailed research packages on key aspects.

After an initial 12 months, the static or "snapshot" mapping should be upgraded from a manual capture and computation methodology, to a real time database. Aside from the obvious benefits this would afford to data management and analysis, a very important by-product can be created, in the form of a real-time mapping and online listing.

The latter will serve as a resource for all music industry practitioners, and audiences – local and global – who enjoy and support South Africa's musical treasures.

10 Credits and Thanks

The Mapping exercise was conducted by Moshito Conference & Exhibitions, and was supported by MMINO – the South African Norwegian Music Co-operation.

Mapping team:

Sifiso Ntuli is a music activist, and passionate venue initiator/operator in exile and at home.
Telephone: +27 72 223 2648 email: miapoka@gmail.com

Irene Louw is a journalist with special interest in entertainment, arts and culture.
Telephone: +27 74 436 9966 email: irenelouw@gmail.com

Nyiko Ngubeni is a marketing graduate, and researcher at Moshito.
Telephone: +27 73 740 8180 email: nyikoze2@gmail.com

Zainu Taliep is an arts administrator with focus on music.
Telephone: +27 797811552 email: ztaliep@gmail.com

Avril Joffe.is a researcher with focus on cultural industries.
Telephone: +27 83 229 6072 email: avril@caj.co.za

Steve Gordon is a music producer, activist and writer.
Telephone: +27 21 424 7737 email: steve@music.org.za

Lee Walters is the General Manager of Moshito Conferences and Exhibitions
Telephone: +27 11 838 9145 email: lee@moshito.co.za
www.moshito.co.za
Report write up by Steve Gordon and Avril Joffe
Images courtesy of Eugene Arries and Steve Gordon www.musicpics.co.za

Thanks especially to the various practitioners of South Africa's live music circuit, who gave of their time to assist us compiling this mapping.

MMINO contact: **www.mmino.org.za** **tel +27 11 838 1383**

MOSHITO contact: **www.moshito.co.za** **tel +27 11 838 9145**

APPENDIX 1 : Self-administered Questionaire

<u>Moshito 2010</u>

Mapping Live Music Venues Research

Questionnaire

Length of Establishment existence?

Type of establishment i.e. bistro/ restaurant/ pub/etc?

How often are there live events held at the venue?

How is the audience attendance and general support of events?

What is the genre of music played at the venue?

What is the relationship with young local promoters?

What is the relationship with local bands? (Challenges, Experiences, Pro's & Con's ?)

What kind of deals can be brokered with regards to payment for local band performances, and what usually is the best deal for both venue and artist?

Challenges experienced in running a live event at venue: Event marketing, competition of other venues within the same region?

____

____

Do the venues offer their space as a rehearsal space on occasion?

____

____

Challenges when it comes to the working relationship between venue management and artists?

____

____

How do the laws of liquor licenses affect your businesses?

____

____

Would you make recommendations in this regard?

____

____

The project document will be used as an information pack for the local and international delegates that will be attending the Music Conference in 2010, particularly aimed at young artists.

Your contribution to this research document is highly appreciated.

Moshito Venue Research Project Team

APPENDIX 2: DATA SET

Data fields for "Mapping Live Music Circuit"
Coordinated by MOSHITO, research funded by MMINO
September - November 2010

NOTES:
The following data sets are locked, and linked to the data entry page. They also serve a "checklist" function for now - or future - mapping.
The lists are linked to the "Provincial Summary" data worksheet, within this XLS spreadsheet.
The lists will surely be updated for future or further research, or if it becomes clear that key parameters are missing for the 2010 study.
If viewing in XLS, use mouseover to see the additional comments and annotations (red triangle).

compiled by: Steve Gordon / Musicpics, for MOSHITO.

BASIC INFO ABOUT THE VENUE OR FESTIVAL

Venue types	Province	Capacity	Music genre	target audience	programme frequency
amphitheatre					
bar	Eastern Cape		african jazz	local	most nights
café bar	Free State		afrikaans	youth	weekends
campus	Gauteng		choral	corporate	seasonal
casino	Kwazulu Natal		classical	tourist	other
civic or municipal	Limpopo		cover bands	varied	annual
club	Mpumalanga		electronica	community	
community arts venue	Northern Cape		folk	students	
convention centre	Northwest		hip hop	see notes	
			house		
festival	Western Cape		jazz		
			klopse		
festival annual	mobile		kwaito		
hotel	more than 1 province		langarm		
mobile			mbaqanga		
music venue			opera		
public open space			R 'n B		
resort			reggae		
restaurant			rock		
shebeen			strong local content		
sports ground			other		
tavern					
theatre					
wine estate					
other					

SUPPLEMENTARY INFO ABOUT THE INFRASTRUCTURE

Technical	Staffing	Facilities	backstage
stage	technical crew	bar	dressing rooms
stage, basic sound	no crew	food	dressing and toilets
stage sound lights		seats	
comprehensive		bar food seats	
monitors			
backline - incl kit			

BUSINESS INFO

Business Type	liquor license	Years operating	artist deal type	venue usage	credit cards?	SAMRO	Support
CC or PTY owned	Yes	new	door deal	available to hire	Yes	licensed	some shows
sole proprietor	No	2 or more	flat rate	rehearsals	No	playlists	yes
civic or state (public)	unknown	5 years or more	various	workshops		unknown	no
NGO	temp.	unknown					funder
		established					sponsor