

song lines

MAPPING THE SOUTH AFRICAN LIVE PERFORMANCE LANDSCAPE



REPORT OF THE CSA 2013 LIVE MAPPING PROJECT
COMPILED BY CONCERTS SOUTH AFRICA



Concerts South Africa School Circuit Programme 2013: FJ Wells Primary School, Randfontein.

NOTE:

This publication was compiled and written by Gwen Ansell and Professor Helena Barnard, on the basis of original research independently conducted during 2013 by Concerts South Africa.

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FOREWORD

There have been occasions when I have been asked by local and international visitors and music lovers, “Where can I go to listen to some good South African music?” The artists usually ask, “Where can I get my next gig?” And the venue owners ask, “How can I survive as a small music venue?” As music industry professionals, I and many others have asked ourselves what we can do to grow a thriving live music scene in the country. This research and the Concerts SA programme do not answer all these questions, but they make a start at seeing how we can weigh, measure and map live music performance as we attempt to transform our music environment by opening new opportunities for the wonderful artists we love. Therefore we are extremely proud to be associated with this research project made possible by our Norwegian partners.



Andre le Roux

Song Lines: Mapping the SA Live Performance Landscape has been a year in the making, and a longer time in the thinking of the music industry and policy makers. The research has seen several drafts, dissected and reassembled by numerous thinkers and writers, and to all of them we are grateful. We are pleased with the outcome – but it is by no means final. It is a work in progress that needs to be updated regularly and we welcome constructive critique in our efforts to build a model for live music development supported by research.

We applaud the initial researchers Akhona Ndzuta, Tracy September, Christina Kennedy, and thank Gwen Ansell and Professor Helena Barnard for the final write-up and compilation. They brought on board additional voices and perspectives: the thoughts of researchers on the topic, and models both local and international. This report is hopefully the beginning of a long and fruitful relationship with the music sector that can develop cultural indicators contextualised in our South African reality, whilst fully acknowledging best international practice. We hope that the report will be read and interrogated by policymakers, cultural workers, arts administrators, musicians, venue owners and promoters. We call on you to engage and assist us in our reflections on the research and in the active implementation of the recommendations as we work to develop viable live music models in South Africa.

While the report was initially designed to inform the activities of Concerts SA, it also intended to serve as a tool for further enriching research in this field. In three city laboratories, Cape Town, Durban and Johannesburg, both the research and our work in developing live music models can undergo constant testing and refinement as we strive to extend our relationships with creative partners, government and other policy makers. These initiatives in turn can activate and support the participation of musicians, promoters, venue owners and audiences; bringing into being innovative forms of broad and inclusive collaboration to build performance circuits for a music-hungry public in both urban and rural spaces.

We intend holding a range of public engagements to present the research. If you wish to attend or contribute to these, please join the Concerts SA Facebook page, the SAMRO Foundation website or call the CSA Team.

Andre le Roux,
Managing Director, SAMRO Foundation

A handwritten signature in black ink, appearing to read 'Andre le Roux', written over a light blue background.



CSA - Joe Makhanza at the Thaba Jabula School in Soweto



THE RESEARCH IN A NUTSHELL

WHY MAP LIVE MUSIC?

Live music is a key source of livelihood for musicians, and is often the 'development lab' in which content and performance are refined and perfected. In addition, while the digital revolution is making CD sales less important as an income stream, it is making live music more important, because every live show offers a unique, unrepeatable experience. Access to live performance should be a cultural right for all South Africans. It is also an enjoyable experience that can do many things: enhance awareness and creativity, light up our history and traditions, build solidarity and open debates.

But despite that, access to performance opportunities for musicians, and listening opportunities for the people of this country are limited and unequally distributed. Thus it became important to find out what the situation really is in 2013; how it came about; and how we can help live music to thrive everywhere in this country.

WHAT DID WE DO?

In 2013, we conducted a survey of a wide range of venues in Johannesburg, Cape Town and Durban. This followed up on and extended an earlier Moshito/Mmino survey conducted in 2010, and employed both qualitative and quantitative methods across a large sample, as well as desktop research. We also considered government policy documents as well as current research and relevant experience from South Africa and from other countries.

WHAT DID WE FIND?

Urban South Africa has a vibrant, varied live music performance landscape.

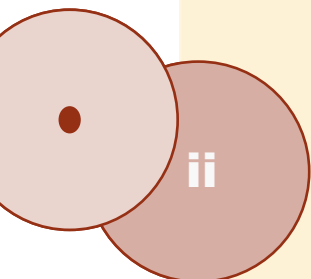
Clubs can survive: almost half the venues we talked to had been in existence for more than ten years; slightly more than another quarter had been established within the past five years. Most of these venues – especially the newer ones – were small, ranging from 200- 500 person capacity. In Durban and Cape Town, most of these venues identified themselves as clubs, bars or places like arts centres structured to offer regular live music; in Johannesburg, the biggest category was restaurants.

Some things are getting better...

Compared to the 2010 survey, many more venues – 32% – were able to offer backline, PA and sound engineering services to the musicians who played there, while even more were happy to hire such equipment or services in.

These music venues are becoming better-organised: 76% can now accommodate card payments; 78% hold a liquor license and 59% can organise regular weekly or monthly programming.

And we see from looking at the responses overall that in South Africa you can't draw lines that are too exclusionary between performance spaces that are bigger or smaller, or





more or less formal. Venues here operate on a continuum and – so long as the willingness and potential is there – could play complementary roles in setting up an effective national touring circuit.

But some things are not changing fast enough...

The scars of apartheid persist. Performance opportunities remain concentrated around metropolitan centres and tourism areas. Mpumalanga, the Northern Cape, the Free State and Northwest host less than 5% of the country's festivals.

- The vast majority of venues – 60% – have no rehearsal space available.
- Only 27% of venues can offer musicians a guaranteed fee for a show
- Most clubs have no form of funding or sponsorship to help with staging live music

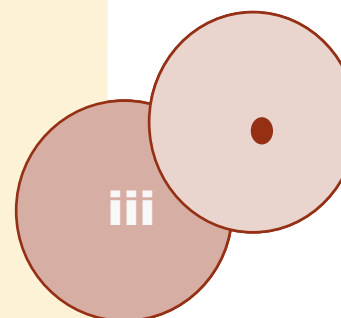
WHAT DID OTHER RESEARCH AND POLICY DOCUMENTS TELL US?

Through international and local research, we now know many musicians have quite sophisticated ways of organising their careers, often making creative use of informal networks of business relationships more than formal structures. From a study of current policy documents, however, we see that government reporting frameworks are best attuned to capturing and responding to information about formal structures and processes.

From studies done overseas, we can also identify new thinking on how to foster successful music touring. The venture needs effective marketing (including relationship marketing and awareness-raising), and planning that matches bands to what audiences are likely to enjoy – but also initiatives that build on what exists in local areas, including less formal opportunities to host live music. All of this works best when it builds from the grassroots up.

WHAT NEXT?

- We need to broaden and deepen our understanding through additional research – and, especially, we need to gain a better grasp of how audiences think and behave.
- We need to look carefully at what performance opportunities may already be present in rural and township areas: traditions like music stokvels and makwaya circuits, for example, and what opportunities and needs exist to integrate some of these into a national touring circuit.
- We may need to offer more mentoring to venues so they can upgrade what they can offer to touring musicians and to audiences; and so that they know more about how to access sponsorship or funding.
- And we need to continue to raise awareness about live music, both in terms of community activation to build audiences, and in terms of lobbying to enhance official understanding of the genre-specific ways that live music needs to do business.

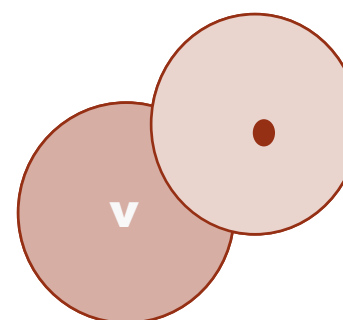




Untitled pastels, J. Seidman 2010

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CSA Exchange Programme - The Muffinz in Norway 2013, photograph courtesy of Rikskonsertene

EXECUTIVE SUMMARY

The sum of the work done makes it clear that the South African music industry has not been immune from the effects of the disruptive technological revolution in the music industry worldwide: a wave of innovation that has had both beneficial and uncertain outcomes. In the context of live performance in particular, the increased accessibility and portability of music performance and recording equipment, and the increased flexibility of distribution modes, opens more opportunities. Resource-constrained developing countries can now develop touring circuits that both build on existing infrastructure and social capital and extend these to include under-served contexts such as rural communities, through the incorporation of smaller and even non-formal venues. International experience provides useful insights into such strategies.

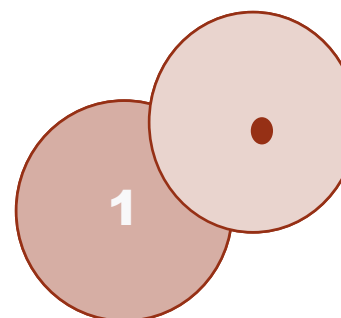
The 2010 live music mapping survey provided theoretical anchoring for a specific definition of the concept of a 'live music circuit' and its relevance to South Africa. Its conceptual and management framework was grounded in three core dimensions of sites/events/venues: permanence, formality of organisation and level of equipment. The 2010 report mapped this concept in depth across two key industry hubs in SA; Johannesburg and Cape Town, and produced recommendations on this basis. It additionally examined the historical roots of the situation it described.

The 2013 study traced the evolution of the concept and its setting in the intervening three years, and made a unique and significant contribution by broadening the database to provide extensive national contact information, from which it derived a survey sample. It also deepened the study of individual venues' business behaviour at the micro-level. But despite these achievements, the South African (and African) music industries remain a relatively data-poor environment for researchers, and the constrained nature of some findings in both reports is indicative of these challenges.

The 2013 survey also indicated a disappointing lack of progress in some aspects of the music circuit landscape, particularly those related to access and music livelihoods. However, there has been evolution in other dimensions of the music scene both internationally and nationally, and other relevant research has been conducted and published relating to the business functioning of the music industry, especially in developing-country contexts. In the light of all these, it is necessary to begin considering whether viable live circuit options exist based on models that are more flexible in terms of how they weight the three core dimensions (formality, permanence and equipment).

This report outlines the key features of the 2010 and 2013 research, and brings these together with other research conducted during the same timeframe, including research interviews relating to South African practitioners' experience of a variety of live performance settings, and international research on other circuit models.

Triangulating from all this evidence, the report offers potential explanations for the apparent lack of dynamism since 2010. As it becomes possible to identify both positive and disruptive industry trends, the report concludes by interrogating the drivers of sustainability and viability in these various circuit models, mapping the lacunae in existing research, and suggesting future research directions.



INTRODUCTION

TOURING THEN & NOW

“So I played in this [white] man Thabo’s hotel...he gave me a back room to sleep, said there would be food. The first night I never slept. There were big rats on the plank floor. Big, big rats! When I went to get breakfast the next morning, [his mother] was there... She says: ‘You must call him Baas Thabo. And I’m running a business here; you’re not going to get my food for free!’... I remember touring to Klerksdorp and asking the bandleader, Mackay [Davashe]: ‘Is there a place where I can sleep?’ He said: ‘We are here to play music and we sleep in the truck when we go to the next place. We have no time for sissies!’”

-- Pat Matshikiza, interviewed by Gwen Ansell for the Johannesburg Star newspaper, 1999

“A 30-something female musician was offered a verbal agreement to play a 3-month show out of town. In the agreement, accommodation was to be included in the form of her own flat. She reported being eventually housed in the domestic [servant’s] quarters on the sound engineer’s property, where she had to share facilities with him. She complained that he was difficult and of dirty habits... [After she complained], she found that relationships with the sound technician deteriorated considerably. She felt that he retaliated by deliberately compromising her sound onstage... The living arrangement and the subsequent harassment caused her to have a minor psychological breakdown.”

-- Case study from interview cited in Birkholtz, 2009

Nearly half a century separates the two experiences recounted here: pianist Pat Matshikiza is recalling the 1960s; Kristel Birkholtz’s interviewee, the mid-2000s. But it seems that the passage of time, changes in music industry structures – and even the ending of apartheid – have changed too little about the difficult, uncomfortable business of touring for the ordinary jobbing musician. The anecdotes suggest something else: that live touring in South Africa has historically been and continues to be so important for musicians’ income streams that they have been prepared to tolerate poor conditions to retain this type of work. Indeed, changes in the industry value-chain discussed later in this report are making live performance an even more important element in a music career everywhere. For this reason, it is vital that we understand how the live performance business sector works, how it is changing, and how it can be developed.

This report details the findings of the August 2013 CSA Venue Mapping Research study, setting these findings in the context of other (earlier and contemporaneous) research, local and international, on the changing industry context. In so doing, our analysis, discussion and recommendations are directed to developing measures that can achieve:

- growth and platforms for all genres of South African music;
- access to live music for rural and impoverished as well as affluent urban audiences; and
- sustainable livelihoods and improved working conditions for South African musicians.

Stories like those above need to become exceptions and discontinuities in the touring landscape, not its norm. Only through nuanced understanding of the modalities of the business of live performance can this be achieved.



CHAPTER ONE:

BACKGROUND – OVERVIEW OF THE MOSHITO/MMINO 2010 MAPPING OF THE SOUTH AFRICAN LIVE MUSIC CIRCUIT

1.1 OBJECTIVES AND METHODOLOGY

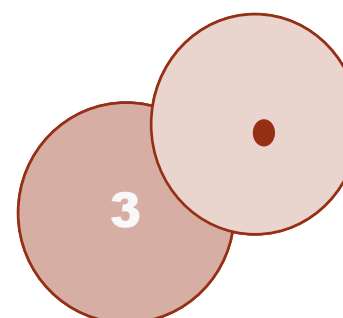
In 2010, researchers commissioned by the Moshito music conference and exhibition (South Africa's oldest-established and largest all-industry gathering) and supported by MMINO (the South African/Norwegian Music Co-operation), set out to map the "routine and recurring" features of the country's live music circuit, to establish a baseline study. The project was initiated because "our live sector is far less developed than the rapidly-growing recording industry... But live music performance is the bread and butter of many musicians, the R&D laboratory of audience tastes and a staple of South Africa's cultural and entertainment diet...[with] massive potential." [Moshito/MMINO, 2010] Moshito/MMINO sought to better understand the context within which they worked, and disseminate that understanding.

The research sample was derived from internet research and enquiries among practitioners. Although the mapping was national in intention, some clusters of questions produced information most relevant to the key music industry hubs of Johannesburg and Cape Town; information from other sources was present, but represented an extremely small sample size. Research was conducted by a mapping team of seven, including cultural industry researchers, music and marketing practitioners and a Moshito representative, using a combination of self-administered questionnaires and face-to-face interviews, with responses recorded against a pre-prepared data-set listing key and supplementary parameters. Qualitative responses were also logged. This was supplemented by critical reading of six South African studies and policy documents (the latest dating from 2005) including the seminal 2001 *Music Industry Task Team (MITT) Report*. Appendix 2 of this research report indicates the relationship of current findings to the MITT recommendations. From footnotes, it is also clear acknowledged international music industry texts, media articles and music blogs were consulted (although unfortunately no consolidated bibliography is contained in the final report).

The 2010 study notes at several points that it was constrained by a data-poor environment: poor both in terms of the amount of scholarship worldwide focusing on live music rather than the recording industry; and poor in terms of work on developing

"Live music performance is the bread and butter of many musicians, the R&D laboratory of audience tastes and a staple of South Africa's cultural and entertainment diet...[with] massive potential."

- Moshito/MMINO, 2010



countries generally and South Africa in particular. (As will be seen later in this report, this data-poorness has lessened, but persists.) The team also faced the problems of dealing with an industry dominated by short-lived business entities without a formal organisational footprint. It was fortunate the mapping team itself possessed extensive industry experience and contacts. This made it possible to draw heavily on supplemental and experiential findings – albeit mainly anecdotal – to augment the discussion and analysis sections.

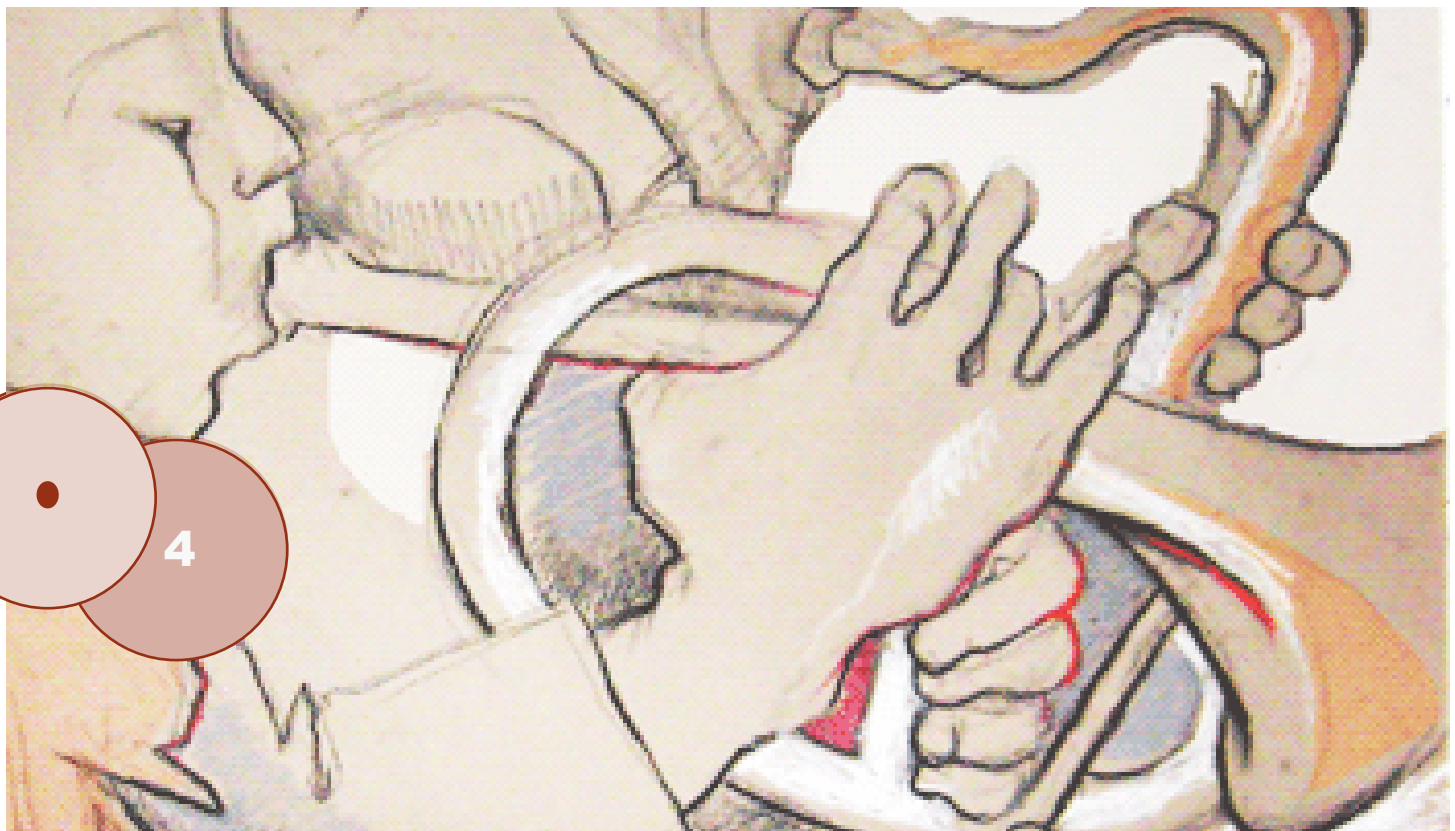
The sample size was small. Both the data-poorness of the environment and the deliberately focused aims of this initial exploration – “the mapping of the permanent live music circuit” – led to the exclusion of various types of performance, some of which (eg corporate shows; hotel residencies; the college circuit for rock music) make a significant contribution to musicians’ careers and livelihoods:

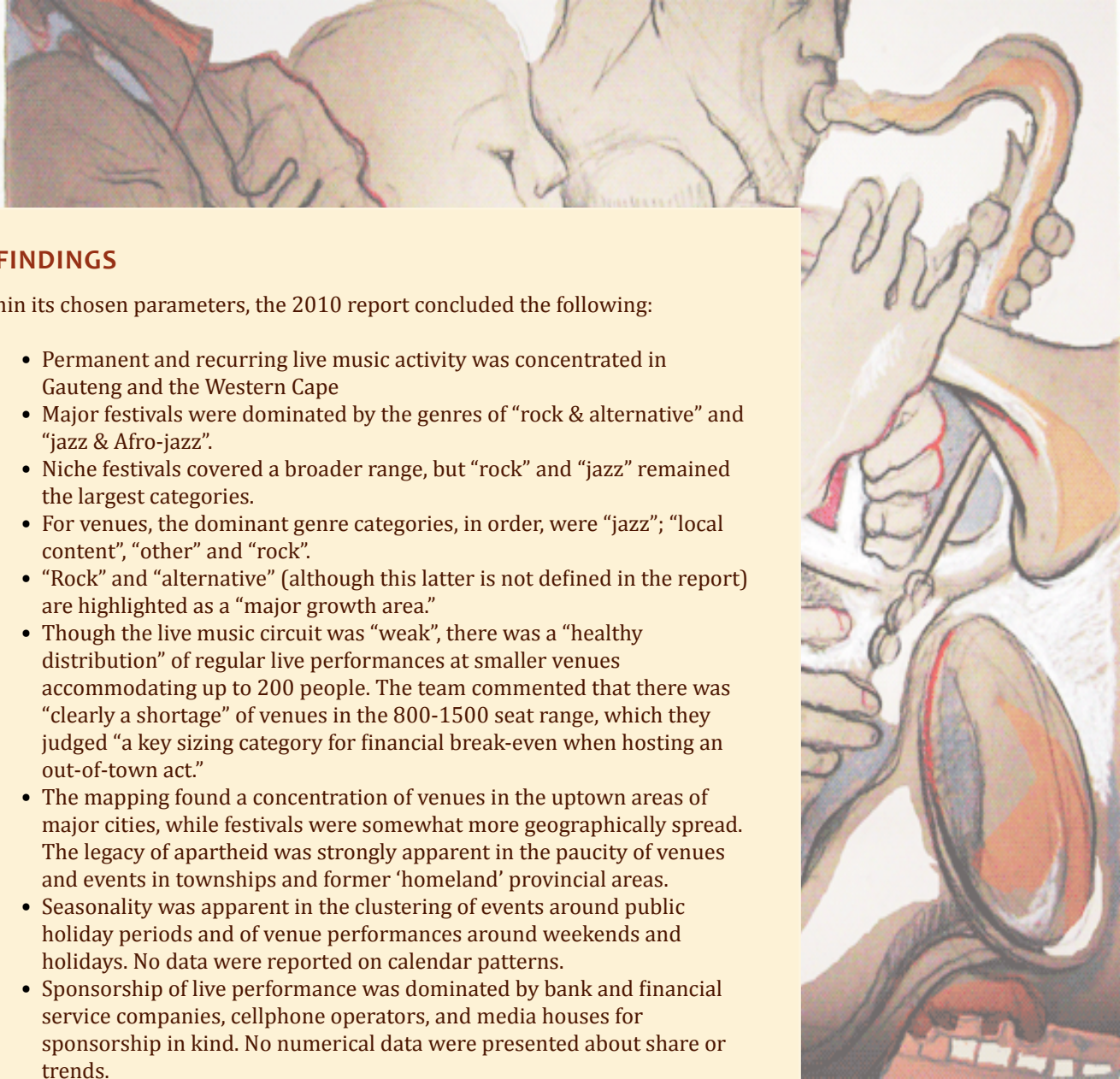
- one-off events including corporate music events;
- government-initiated music festivals and concerts;
- institutional performances (by orchestras; at colleges);
- ‘voluntary’ (eg Field Bands) and religious performances;
- large-scale commercial concerts featuring international artists;
- residencies; cabaret, musicals and operas; ‘arts festivals’ where music is only a minor part of programming; and
- performances by South African artists outside South Africa.

Neither audiences nor musicians were directly targeted by the research, although comments from musicians included or alluded to suggest that the researchers’ rich contacts provided opportunities to discuss questions and findings with them on an ad hoc basis.

The team divided established music festivals into ‘major’ and ‘niche’ (those defined by an exclusive music genre of content). Since interviewees were not presented with a framework for genre definition, this created both large aggregations and fragmented scatters of response data around genre; providing intriguing answers meriting further and more rigorous exploration.

Untitled pastels, J. Seidman 2010





1.2 FINDINGS

Within its chosen parameters, the 2010 report concluded the following:

- Permanent and recurring live music activity was concentrated in Gauteng and the Western Cape
- Major festivals were dominated by the genres of “rock & alternative” and “jazz & Afro-jazz”.
- Niche festivals covered a broader range, but “rock” and “jazz” remained the largest categories.
- For venues, the dominant genre categories, in order, were “jazz”; “local content”, “other” and “rock”.
- “Rock” and “alternative” (although this latter is not defined in the report) are highlighted as a “major growth area.”
- Though the live music circuit was “weak”, there was a “healthy distribution” of regular live performances at smaller venues accommodating up to 200 people. The team commented that there was “clearly a shortage” of venues in the 800-1500 seat range, which they judged “a key sizing category for financial break-even when hosting an out-of-town act.”
- The mapping found a concentration of venues in the uptown areas of major cities, while festivals were somewhat more geographically spread. The legacy of apartheid was strongly apparent in the paucity of venues and events in townships and former ‘homeland’ provincial areas.
- Seasonality was apparent in the clustering of events around public holiday periods and of venue performances around weekends and holidays. No data were reported on calendar patterns.
- Sponsorship of live performance was dominated by bank and financial service companies, cellphone operators, and media houses for sponsorship in kind. No numerical data were presented about share or trends.
- Descriptive sections of the report described funding (aid-type support) as dominated by government and foreign cultural institutions and donor agencies. No numerical data were sought about share or trends.
- Anecdotal material suggested funding and sponsorship were concentrated on larger venues and major events.
- Anecdotal material demonstrated wide variation in the types of remuneration deal artists were offered, from the ‘door deal’ (a percentage of door takings) to various flat fees for differently-sized events, sometimes with “exposure” adduced as a trade-off for lower fees. No data were reported.

The 2010 mapping project marked a major landmark in exploring the material circumstances of live music work in South Africa. By drawing on necessarily limited evidence to demonstrate how these circumstances impacted on the existence of, and prospects for, a specific model of venue and touring circuit, it provided the first in-depth, national study of a key aspect of the topic.

Additionally the 2010 Mapping Project reflected on its own constraints and provided useful recommendations for broadening and deepening future study. Many of these were picked up by the current 2013 CSA study, whose discussion forms the remainder of this report.

CHAPTER TWO:

OVERVIEW OF THE 2013 CSA VENUE MAPPING RESEARCH

2.1 AIMS AND METHODOLOGY

The 2013 research was not an attempt to precisely replicate 2010 for two reasons. Firstly, its funding and implementing partners had slightly different objectives. Secondly, it took on board the suggestions for extension and improvement made in 2010.

Concerts South Africa (CSA) is a joint South African/Norwegian initiative operating under the stakeholder hub of the SAMRO (South African Music Rights Organisation) Foundation. As such, it has ties to an organisation rooted within the South African music industry, with the capacity to implement the strategic implications of the research. The objective of the study was thus to seek ways of providing practical stimulus for the development of music performance circuits in South Africa, as part of CSA's broader objectives related to "identifying and activating a live music circuit" and "developing and supporting live music venues" (Norway/South Africa, 2012).

This stands in contrast to the roles of MMINO and Moshito in 2010: the former located within an arms-length funding and policy body, the National Arts Council; the latter a music industry conference organiser seeking to better understand and inform its constituents.

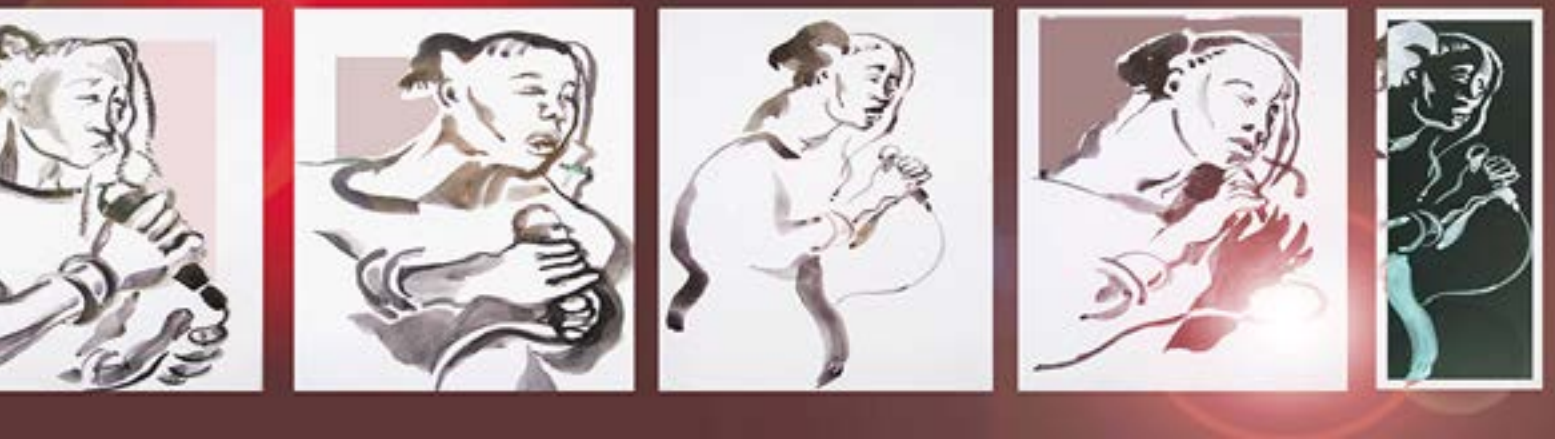
So, although the aim of the 2013 research was, as in 2010, to obtain a 'snapshot' of the performance landscape, this outcome was viewed as potentially providing the foundation for future policy and implementation as well as knowledge-gathering. The research would:

- Inform the implementation of performance circuits and other aspects of CSA's Action Plan;
- Garner ideas about how establishments could be encouraged/supported to host live music
- Develop and refine cultural indicators for future work and research; as well as
- Extend knowledge in areas highlighted by the 2010 study.

The 2013 survey did not set out, as 2010 had, to map the whole country. It studied venues in Johannesburg, Cape Town and Durban, although the scope of festival research was national. It did, however, broaden its definition of a "live music platform" to include "any platform that [had] showcased live music" in the previous 12 months. This drew in many – but not all – of the kinds of venues and events excluded by the very hard 2010 'permanence' parameter. The research still employs the descriptor "permanent" in discussion.

The CSA team conducted desktop research to compile an extensive database of performance sites: 93 festivals and 103 venues. All venues were mapped and a sample selected for additional face-to-face or telephone interviews to strengthen qualitative data; festival mapping was derived from the desktop research alone.

Research and interviews were based on the 2010 questionnaire, with two differences. Many questions were re-formatted so that answers could be recorded against a selection of closed responses or Likert-type items. This enhanced the precision of answers. Additional questions were added to the 2010 pro-forma. These followed lines of enquiry



Untitled, J. Seidman 2012

suggested by the 2010 team, or sought information on the micro-operation of venues relevant to CSA's practical objectives. (These latter included such topics as the status of businesses and liquor licensing and, where not directly related to this discussion of live performance circuits, their findings are summarised in Appendix One.)

CATEGORY	2010	2013 (CSA, 2013)
Provincial distribution of performance opportunities	Identified 42 festivals Major festivals: Strongest - W Cape 22% Gauteng 17% Limpopo 17%, Northwest 13% E. Cape 9%, KZN 9%, N. Cape 9%, weakest: Free State 4%	Festival categories merged: Identified 93 Festivals (desktop research only)
	'Niche festivals': Strongest - W. Cape 42%, KZN 16%, Mpumalanga 16%, Limpopo 11%, weakest - E. Cape 5%, Gauteng 5%, Northwest 5%	Strongest W Cape 43% Gauteng 22% KZN 12% Weakest (all <5%)Mpumalanga, N Cape, FS & NW
	VENUES: Identified 62 venues Strongest - W. Cape 27%, Gauteng 24%, E. Cape 11%, Mpumalanga 10%, Free State 8%, Limpopo 6%, KZN 6%, Northwest 5% Weakest - N. Cape 2%	VENUES: Identified 103 venues: Did not survey national distribution but looked in-depth at business operations in 3 cities: Johannesburg, Cape Town and Durban
Genres of major festivals	40% jazz & Afro-jazz 60% rock & alternative	17% Rock 17% arts festivals +11% "various" (28%) 12% dance/club music 10% Jazz 9% Afrikaans
Genres of niche festivals	45% rock (including Afrikaans rock) 25% jazz 20% "folk" 5% reggae 5% hip-hop	See above: ('festivals' category aggregated in 2013)
Genres reported by venues	35% jazz 20% 'local content' 18% "other" 15% rock (including Afrikaans rock) 8% hip-hop 4% reggae	(Respondents offered more category options) 23% jazz 58% aggregated local content & other 12% rock 5% hip-hop 2% reggae
Venue capacity	Majority of venues <200-person capacity Shortage of venues in 800-1500 category	Similar, but finding more venues in <500 category: 200-500 category: Durban 47% Joburg 29% ; Cape Town 35%

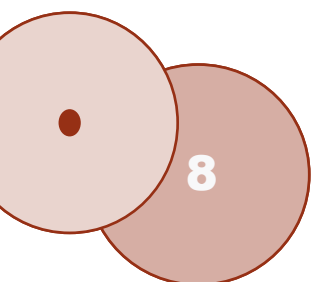
Venue equipment & crew	“Majority” of venues “fall far short”	National average 32% have backline & PA Ditto average 26% hire in for event Backline: Durban best (61%); Joburg worst (9%) Nationally, 49% of venues hire in tech crew; 51% have crew in-house In-house crew: CT worst (38%)
Geographical distribution of venues	Predominance of metropolitan venues	Only considered venues “in the three centres”
Sponsorship and funding	“Banks financial services cell companies liquor brands ... Government, ProHelvetia, British Council etc..”	“Not much has changed...there has been little or no growth”
New questions in 2013		
Age of venues		48% 10+ years 27% 6-10 years 25% 0-5 years
Frequency of live music		Biggest category 1-7 times per week (54%)
International acts		Durban 41% yes Joburg 30% yes Cape Town 80% yes
Use of electronic payments		76% yes
Awareness of music licensing/copyright requirements		83% yes
Musicians’ payment	Only anecdotal evidence presented but suggesting a spread of options similar to 2013	33% door deal 27% guarantee 40% other arrangements
Rehearsal space		60% no
Type of venue		Durban: biggest categories Theatres, Bars & Arts Centres (each 21%) Joburg: biggest category Restaurants (30%) Cape Town: biggest category Live music venues [“clubs”] (39%)

Comparison of performance-related findings of 2010 and 2013 mapping exercises.

2.2 SIGNIFICANCE

The 2013 mapping research thus represents a significant advance on 2010 in precision, breadth and depth. In addition, because of its location within an organisation rooted and active in the South African music industry, its findings have the capacity to leave a legacy.

The research findings will be discussed in Chapter Three, in particular, the extent to which 2013 findings mirrored 2010, and what this apparent lack of movement signifies for the live performance sector.



CHAPTER THREE:

DISCUSSION OF THE 2013 MAPPING RESEARCH FINDINGS

3.1 THE UPSIDE: AN ACTIVE SCENE WITH BOTH ESTABLISHED AND NEW ENTERPRISES

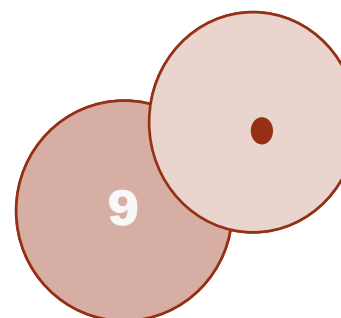
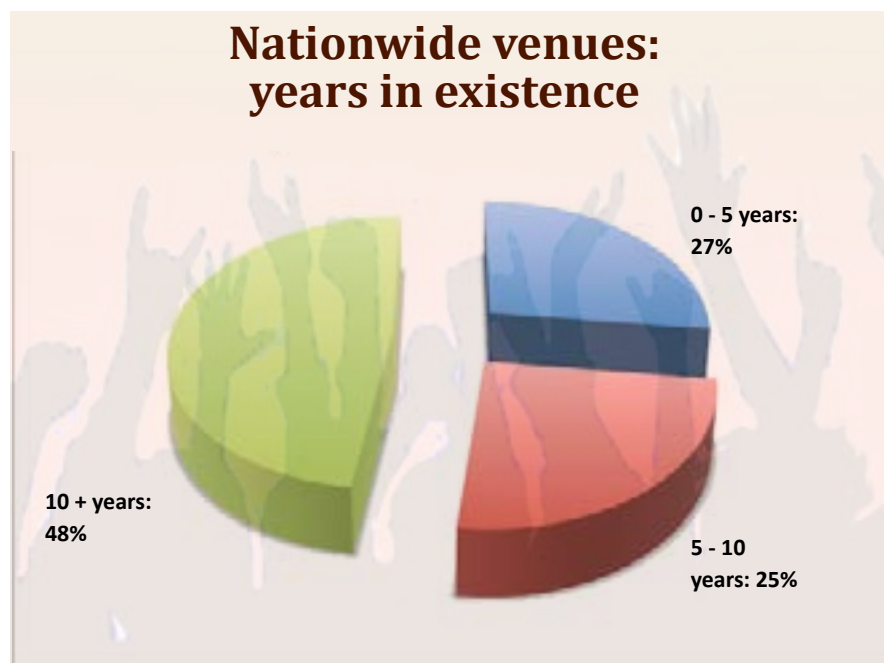
The 2013 project – focusing only on three metropolitan centres, and still retaining some of the 2010 survey category exclusions – identified an initial 233 active live music venues, eventually narrowed down to 103 for in-depth research purposes. Set against the 62 venues identified across the whole country in 2010, this indicates a vibrant, multi-genre scene.

This finding cannot simply be read as denoting either a growth in the number of venues, or an improvement in research coverage. The 2010 researchers noted they were constrained by industry volatility and the dominance of SMMEs with a limited formal footprint; it is likely that the 2013 research roots within the well-connected SAMRO was one factor making venue identification more efficient.

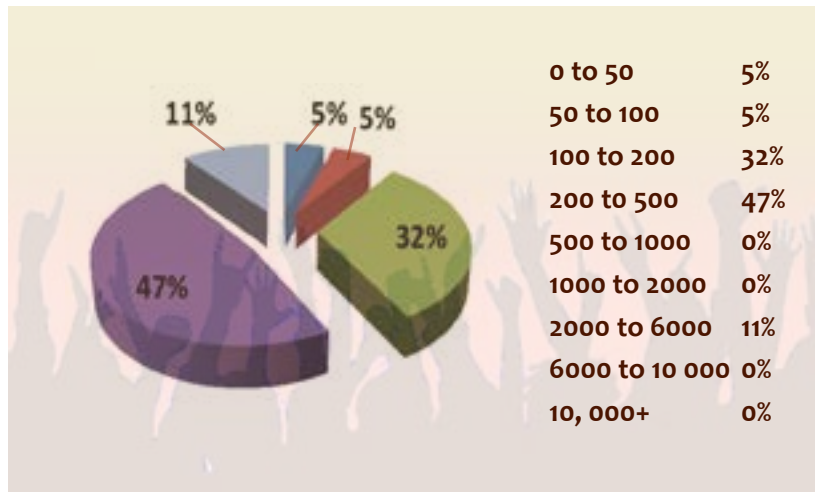
However, it is also possible that some venues are maturing, establishing a formal identity and/or employing newly-available online tools (eg a Facebook page) that made them easier to find via an initial mapping that was desktop-based. Other data indicating a degree of business sophistication (for example 76% of venues nationwide accepting electronic card payments) might support this. All of these potential explanations merit future investigation to determine whether there are now more venues active, whether venue information is now more accessible, or some other factor is at play.

However, most interesting is the age profile of venues. Nationwide, close to half of all venues have succeeded in surviving for more than a decade and a quarter for 6 or more years, while another quarter – a significant proportion – have opened within the past five years. Figures for the three cities dis-aggregated show a similar pattern, although Durban has the highest percentage (58%) of long-lived venues. This means that around three-quarters of these venues were in existence at the time of the 2010 research, and thus strongly suggests enhanced accessibility of research information since then.

In addition, the longevity profile indicates both resilience and innovation at work. A 2010 study of innovation in the music industry found that more than 70% of industry entities surveyed had been established after 1991[Ansell & Barnard, 2011]. Music is a young industry in South Africa, but many of its enterprises clearly have effective business skills and survival strategies that have allowed them to ride out recent economic fluctuations.



Venue Capacity: Durban



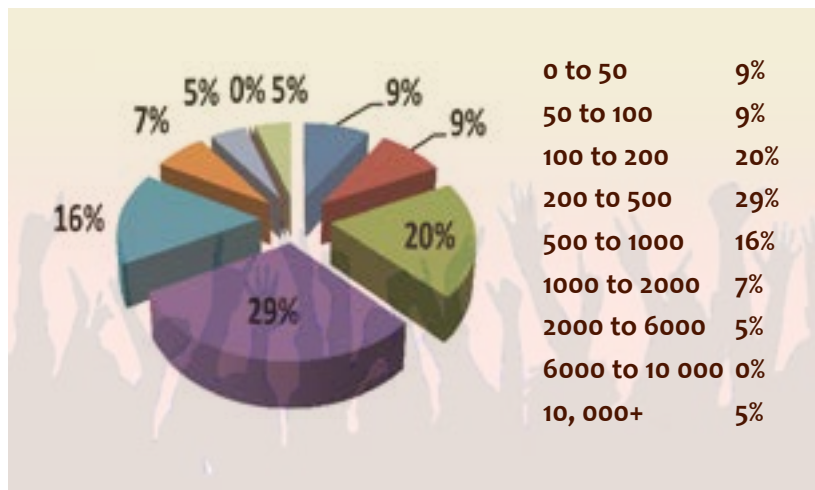
A fruitful area for future research would be a detailed study of long-lived venues to identify these strategies.

The 2010 research found a predominance of venues with a capacity below 200 persons, although it did not cite figures. In 2013, more than 85% of venues opened over the previous ten years were found to be in the '500 or below' category; ranging between those "shoeboxes" to 500-patron settings.

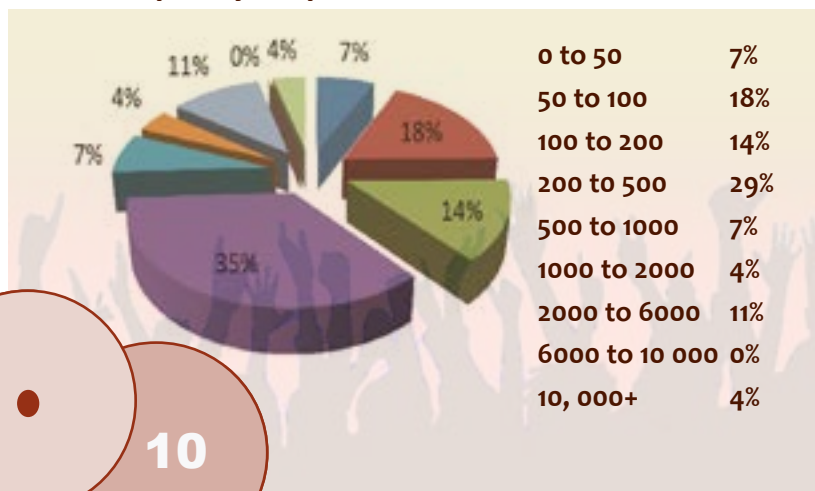
The research did not interview concerning size choice, and causation may be complex. However, a real possibility is that the significant post-apartheid opening of business opportunities to people, and in communities, with a more diverse socio-economic makeup is strongly implicated. Club entrepreneurs may now find this size-range the most viable for current cost and audience/demand conditions. This would triangulate well with the development of niche music audiences defined by taste as an observed trend in the international industry, robustly supported by research. More work in South Africa is required to understand causation better.

The emergence of these small clubs has significantly enhanced the performing landscape and the prospects for viable touring. If future research can causally link the size trend to current market conditions, it also suggests that rather than seeking – as the 2010 research did – more venues in a larger (800-1500 capacity) size category to suit the needs of tours, CSA ought also to examine ways in which touring circuit modalities could be adapted to be inclusive of smaller venues, including those already existing in townships and rural areas. The former option points towards interventions creating more fixed physical infrastructure; the second in the more developmental direction of capacitating and supporting smaller venues, and sometimes less conventional performance settings.

Venue Capacity: Johannesburg



Venue Capacity: Cape Town



3.2 EQUIPPED AND SERVICED VENUES

Another extremely positive finding was the extent to which many venues are now providing backline, PA equipment, sound engineering services (though for 60% not yet rehearsal space) for the musicians who play there. In Johannesburg, the equipment is heavily (41%) hired-in; this may relate to the most Johannesburg venues describing themselves as 'restaurants' – they may not view owning and maintaining such equipment as relevant to their core business. In Durban only 17% hire-in. In Durban and Cape Town more venues described themselves as clubs, bars or arts centres: enterprises for which sound equipment is core. This finding also suggests that those who enter explicitly into the venue business (as opposed to opening a restaurant with occasional music) do understand what resources are necessary for their enterprise. Contrasted with the 2010 comment that "most venues...fell far short" on equipment and facilities, it implies some growth in sophistication and care for the music on the part of venue owners and managers.

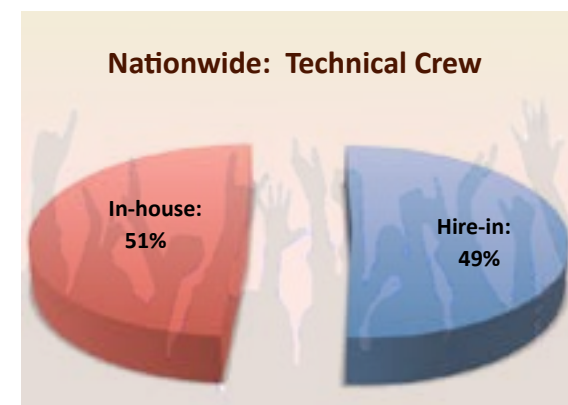
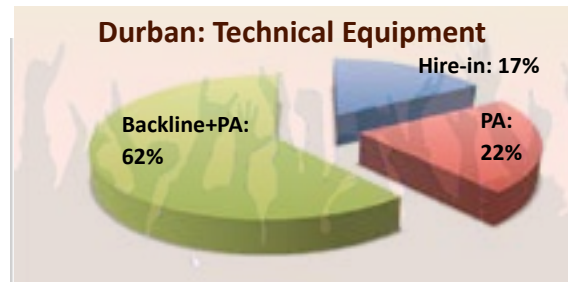
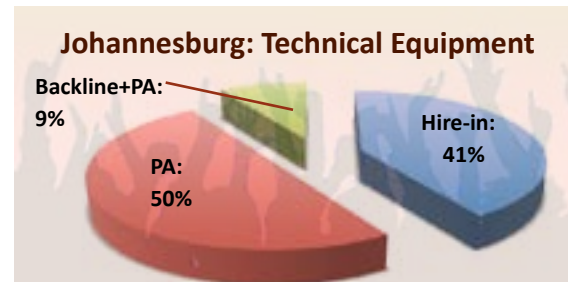
Other important factors here are the improved distribution, lower cost and greater portability of music and sound equipment. This relates to the expanded activities of South African companies (eg Music Mate, TOMS) marketing budget imports from the Far East (which, unfortunately, has negative employment implications for the South African electronics manufacturing sector) and to the multiple function and micro-size of many digital components. This development not only makes equipping a club simpler and more cost-effective (and facilitates both recorded and live music events), but also opens the prospect of affordably equipping other, non-formal venues to augment a touring circuit.

Linked to this, the increased activities of colleges and workplace learnerships in training sound engineers and technical crew have increased the supply of this skill at all levels, making 'crew' a more accessible resource for venues too. And, likewise, this also opens the option of more easily and affordably putting crew on call for non-formal venues in a circuit.

An important caveat to all this is that a positive response to a questionnaire or interview about possessing such resources provides no information about quality, maintenance or level of skill. As in any other enterprise, the practical implementation of touring plans will call for on-the ground investigation of these aspects in each venue, and quite possibly for support resources in the form of additional mentoring.

Equipment and engineering were not the only signs of increasingly sophisticated club management nationwide:

- 76% of venues could now accommodate card payments;
- 83% of venues were aware of music licensing requirements (although interviews revealed wide variation in levels of understanding);
- 78% of venues held a liquor license; and



- More than 50% of venues were able to offer regular weekly programming (1-7 nights) and 9% regular monthly programming

However, only:

- 30% of venues had already demonstrated the capacity to host international acts;
- 27% were able to offer guaranteed payment to musicians; and
- 40% could offer some form of rehearsal space.

3.3 THE DOWNSIDE: NO CHANGE IN TOO MANY DIMENSIONS

In four dimensions strategic for both financial viability and audience development – sponsorship and funding, payment arrangements with musicians, geographical distribution of festivals, and lack of township venues – the 2013 research found little or no change from 2010.

To a small extent, this is a function of the research limitations. Since the research needed an approach tightly focused on the view of the live performance scene from the perspective of venues, it was outside its remit to examine, for example, the important changing modalities of funding. Because its three-city focus was exclusively urban, any movement in rural areas remained unexamined. For this reason Chapter Four will contextualise the research detail by examining other changes in the years 2010-2013 relevant to the findings and conclusions.

However, much of the reported stagnation is real. Many of the limitations in geographical venue location, arbitrary payment arrangements, and community access to live music have deep historical roots. The 2010 research referred extensively to the heroic role of music in the struggle against apartheid. This is an important part of South African cultural history and needs to be remembered. However, less well documented and discussed are the structural deformations and underdevelopment (in the classic economic sense) imposed on the South African music industry by labour reservation, the pass laws and travel restrictions, and the ideological policy of re-tribalisation. Among the industry consequences of apartheid (this is not a complete list) were:

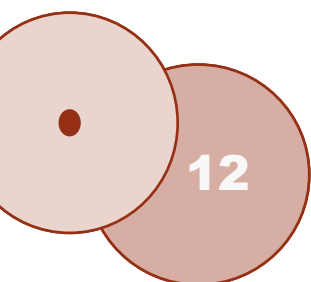
- Retribalisation, enforcing tribal cultural ‘purity’, fragmented the black music market into sub-economic niches defined by ‘race’ rather than taste;
- The exaggeration of semi-professional modes of work and attitudes among black musicians, and modes of treatment/payment among promoters and venue owners;
- The destruction of township and ‘homeland’ live venues which formed the first rung on the professional development ladder by removals, work/residence restrictions, assembly bans and States of Emergency; and
- The development of segregated live performance attendance patterns. (Ansell, Barnard & Barnard, 2007)

The 2001 MITT report findings, long before 2010, had already indicated how many live performance problems – particularly the neglect of grassroots community practices and structures and the social and geographical inequalities in the access of both performers and audiences to live music – are rooted in South African history. The tracks of these deformations persist and can be read in the areas of stagnation identified by the research.

However, the ‘legacy of apartheid’ alone is only a partial explanation for this stagnation.

“Nobody’s helping venues to survive -- yet every night I meet people who want to go out and hear good music..”

- Afrika Mkhize, pianist, Business Day, 24 November 2011



Over the past 20 years there have been opportunities for proactive official policies and (facilitated – or at least not hindered – by these) professional and community initiatives to counteract the lack of development. Chapter Four discusses the content and direction of cultural policies over the research period 2010-13.

In addition, it is necessary to interrogate some conventional industry assumptions about the components and preconditions for sustainable live performance. In particular we need to examine the assumption that only one business model is possible for a sustainable live touring circuit. Chapter Four looks at some alternative live circuit models – from both developed and developing country contexts – that might offer useful insights for a South Africa struggling not only with generic problems of development, but with the specific legacy described above.

3.4 RESEARCH LIMITATIONS

Every research project has limitations and these limitations often provide valuable starting-points for subsequent research that can not only fill lacunae in present findings, but also point to ways of refining future research technique.

3.4.1 The music genre problem

A persistent problem in both the 2010 and 2013 mapping exercises has been the highly variable and sometimes idiosyncratic way respondents identify music genres. The 2010 researchers noted:

“...many respondents use the term ‘jazz’ to encompass programming of ‘world music’ and ‘afro-jazz’ (...) if jazz is deemed the saleable label, [artists and promoters] will wield that label.”

Similarly, in 2013, interviewers (who, as in 2010, found ‘jazz’ to be a dominant affiliation) commented:

“...the definition is broad and has more to do with venues branding themselves as upmarket venues than with the type of music consumed.”

The problem extends beyond the label ‘jazz’: it is equally hard to know what respondents mean by the plethora of genres customised with the prefix ‘Afro-’, or how they differentiate between ‘traditional’ and ‘folk’ music – and there are many more examples.

For as long as the research focuses theoretically on venues, this is an irritation but not a major handicap. The demarcation lines being drawn are broad. As soon as CSA moves into the business of practically planning live performance tours, it becomes a limitation, constraining good business decisions about which music to allocate to which venue.

It therefore becomes necessary for future research to re-formulate genre questions with a data-set that offers respondents closed answers defining what the researchers mean by each label. These could be definitions, comparisons (“Music of the type that X performs”) or even a Web-accessible ‘dictionary’ of sound-clips. They need not be definitions that would satisfy an academic musicologist as ‘correct’ or comprehensive: their purpose is purely to ensure that when researcher and respondent use a term such as ‘Afro-Soul’, they are both talking about the same thing and that when research results are published, the audience, too, understands what is meant.

“People don’t support live music. If you get an international artist or DJ, they come in their numbers – but when it’s local talent, people don’t come. We should play and promote more local music, so people come to know that music as well as they know the international stuff.”

- interview, 2013

“The great value of [conventional economic] accounts is that they present data...directly comparable with other sectors... [But] this is also a weakness, since it assumes...that the creative economy is precisely the same as the rest of the economy”

-- UNCTAD, 2008

3.4.2 Definitions

Both the 2010 and 2013 research have been guided by definitions derived predominantly from well-established Western models of live music circuit organisation. These involve seeking venues that are “formal, permanent and well-equipped”.

It was clearly appropriate, and effective in practice, to begin the research within these parameters. As the 2010 researchers noted, the data-poverty of the field and the SMME character of many enterprises made it near-impossible even to find entities to research outside these parameters. In addition, given the mixed nature of the South African economy and the diverse levels of development in different geographical areas, there is no doubt that “formal, permanent and well-equipped” venues will always form a key part of any live performance circuit. We need to know about them.

However, we have already seen one problem created by such a hard definition. If CSA's concern is with music exposure and access and sustainable livelihood for musicians, excluding venues that are non-formal, project-based and need to hire-in equipment renders important information invisible. The 2013 research recognised this, and loosened definitions somewhat. As a result, it uncovered large numbers of un-equipped venues that hired in sound gear and staged well-attended performances. It also noted the decreasing cost and increasing portability of sound equipment.

Future research may wish to enquire even more widely, for two other reasons.

Firstly, there is an uneasy tension between the search for formal structure and permanence, and the nature of the music industry as a business. As UNCTAD reported, like other creative and cultural industries, music is characterised worldwide by a heavy reliance on project-based activities, short institutional life and non-standard business practices. Much as this complicates policy making and support efforts, it needs to be recognized as a source of effectiveness and creativity, not a defect. (UNCTAD, 2008; Second edition, 2010).

Secondly, such an exclusive focus risks excluding from consideration some key dimensions of the industry. An exclusive focus on venues that are formal, permanent and well-equipped glosses over both historically-rooted South African practices conducive to building circuits, and innovative new initiatives emerging from the industry value-chain revolution. Research relating to some of these will be discussed in Chapter Four: a few brief examples will suffice here.

Shangaan *makwaya* music, Zulu *isicathimiya* music, African gospel and choral music and township jazz stokvels all already run “circuits” which provide a source of livelihood for performers and organisers. These operations have long been rooted in their communities and are relatively sophisticated: as well as collecting payment for performance, for example, members often video shows and market ‘unplugged’ DVDs of these. Most have links to their own equivalents of what sound engineer Ian Osrin has described with reference to Mpumalanga as “an important non-traditional [gospel] distribution chain that can shift around 7 000 copies, but goes completely under the radar of Anglophone industry analysis.” (Ansell & Barnard, 2013)]

As one example of contemporary non-formal venues, Durban surf-music bands organise pop-up performances in surf shops; again, employing portable digital technology to record, film and market music, DVDs and show memorabilia on the spot.

Although it might require some institutional adjustments on both sides, there is no intrinsic reason why such structures – and, perhaps more importantly, their accumulated institutional knowledge and associated community practices – should not at some

point be linked into national live performance circuit planning. In the interests of transformation, the fact that they have not featured in formal Anglophone industry analysis to date is an even stronger reason why they should do so in future.

3.4.3 Other voices and sources of information

To date, the mandate of both mapping exercises has been to seek information about and from venues. However, to turn theory into practice and effectively organise a live circuit, a 360-degree view of the performance landscape is required. Thus the third phase of this process needs to seek formal, quantifiable input from both performers and audience. Much South African research has already begun to tap musicians' views, experience and business practices, and this will be discussed in Chapter Four. Audience research remains extremely limited, and should be a priority.

The desktop data related to festival venues remains limited and provisional, and festival organisers, performers and attendees should be part of the next research population.

In addition, and linked to the consideration of 'traditional' circuits discussed above, more research on the rural performance context is required if CSA's priority of increased access to live music is to be realised.



Kesivan Naidoo, SAMRO Overseas Scholarship winner 2000 for Jazz/Popular Music. Photo: Suzy Bernstein

CHAPTER FOUR:

CONTEXTUAL CHANGES 2010-2013

It has been widely noted that cultural production, including that of music, occurs within a broader societal context as well as on a stage. In one of the few specifically South African explorations of this concept, Professor Christine Lucia (after Bourdieu) mapped the context as three 'worlds' in continual interaction: the world of artists and their immediate working context; the world of the industry and related bodies including funders, audiences, policy-makers etc; and the world at large including its power structures, economic systems and technologies. [Lucia, 2005]

These 'worlds' have all had some impact on what the CSA mapping research discovered, and will continue to interact with any ensuing policies and activities. A survey of context can therefore usefully employ the broad divisions of Lucia's framework to situate the 2013 findings.

4.1 THE FIRST 'WORLD': CHANGES IN THE IMMEDIATE WORKING WORLD OF MUSICIANS

4.1.1 Enriched scholarship: learning more about how musicians think and operate

Both the 2010 and 2013 mapping exercises chose as their primary focus the experience of venues. While the other perspectives, audiences and performers, have been explored in earlier scholarly research – including some seminal works on South African music – much of this work has taken a predominantly historical, biographical or musicological approach (Ballantine, 2012; Coplan 2011; Ansell, 2004; Devroop & Walton, 2010; Muller, 2011) However, the first decade of the 21st century in South Africa has seen a fresh focus emerging: scholarly work that explores music as a field of economic activity, and interrogates the working lives of players.

This development has not been limited to South Africa. Business scholars overseas have for some time been studying the flexible structures and processes of cultural enterprises (and particularly jazz ensembles) as sources of fresh skills and approaches for team and enterprise management. (Barrett, 1998, 2012; Faller 2002; Humphreys, Ucharasan & Lockett, 2012; Lampel, Lant & Shamsie ,2000)

To fully understand the opportunities and constraints around live music touring, a 360-degree view is required. Venues, audience and musicians all possess relevant insights and information to inform planning.

As examples of insights and information directly relevant to the concerns of the CSA project that are available from scholarly work, we cite the following recent unpublished South African studies. This is not a full literature review, and future mapping research could with benefit conduct a literature search and evaluation of recent scholarship.

Kristel Birkholtz studied the role which musicians played in defining the industry within which they worked, and how well they were equipped to play a proactive role in industry development. (Birkholtz, 2009) Birkholtz conducted extensive interviews and also produced a very comprehensive review of international literature on this topic. She



Untitled, J. Seidman 2009

utilised and contextualised for South Africa a concept very useful for the CSA mapping: the 'musician corps' of non-star musicians whose experiences are far more typical than those of often-interviewed and researched 'stars'. (Development Works 2004) Birkholtz concluded that there were important skills gaps among the majority of musicians, constraining them from securing maximum benefits from performance opportunities. Her work offers relevant insight into the mentorship that may be required to support a live touring circuit.

Professor Helena Barnard and Gwen Ansell undertook a study of the business innovation approaches of the South African music industry as part of a joint Sweden-South Africa multinational and multi-industry study of innovation strategies for globalization in 2009/10. (Ansell& Barnard, 2013) By gathering data from a diverse selection of industry role-players – venues, music organisers, musicians and industry service providers – they assembled evidence that the industry makes its innovative impact by drawing on strong, well-established relational networks. In this context, and considering broader industry changes, official policies that emphasise fixed physical infrastructure may yield fewer concrete returns than targeted interventions to support digital readiness and the live music scene.

William Masemola studied the utility for musicians' career-building of appearances at festivals (Masemola, 2012). His sources spoke about their experience of working in a major festival and the benefits they had gained from development programmes. Masemola concluded that the festival had afforded new musicians significant exposure (to audiences, and to the requirements of a large-scale event). However, for already-established players, it was far harder to establish any correlation between festival exposure and further career/skills development. This provides a useful perspective on how live festivals might more effectively play a developmental role.

Akhona Ndzuta conducted in-depth interviews with musicians about their day-to-day working practices. (Ndzuta, 2013) Ndzuta highlighted the 'survival strategies' musicians employed: negotiating the fine line between artistic integrity and business viability, and illustrated the sometimes fraught relationships between performers and promoters. She also illuminated the quite sophisticated band management approaches many musicians had developed, including their deployment of both formal techniques and resources, and informal relational capital. Her work highlights the importance of non-formal structures and processes in a creative industry, but also important gaps in policy and regulatory frameworks.

Brett Pyper has conducted a long-run study into the operation of one of South Africa's best-established but largely undocumented informal circuits: the jazz appreciation movement (Pyper, 2014). Jazz appreciation clubs or societies, many of which are organized as stokvels, focus primarily (but not exclusively) on providing a platform for recorded rather than live music. However, they have deep historical roots in their communities and can attract very large audiences to their events. They are supported by both grassroots and formal organisational structures (committees) facilitating the movement of events around areas as well as effective resourcing and management. Pyper's work offers insight into the type of 'traditional' and institutional knowledge that South Africa already possesses, and which could play a role in future live circuit initiatives.

“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.”

- respondent, 2010 survey

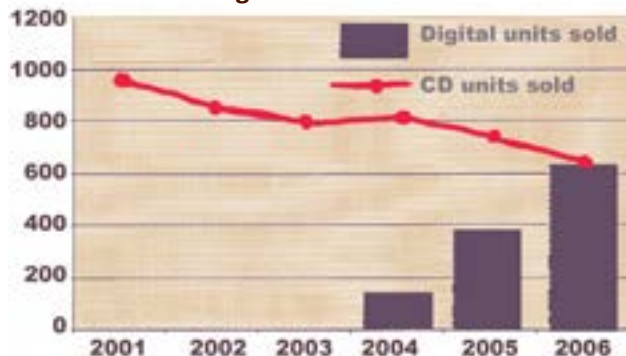
Many of these studies have underlined the importance working musicians attach to live performance as a source not only of income and exposure, but also of professional networking, professional learning, and opportunities to engage with their audience. The insights of these studies can usefully augment the findings of the 2013 research. Since further information about musicians' experiences and views can already be accessed from this work, the priority for any subsequent phases of 360-degree research should be audience.

4.1.2 The local industry: the value-chain revolution visible at home

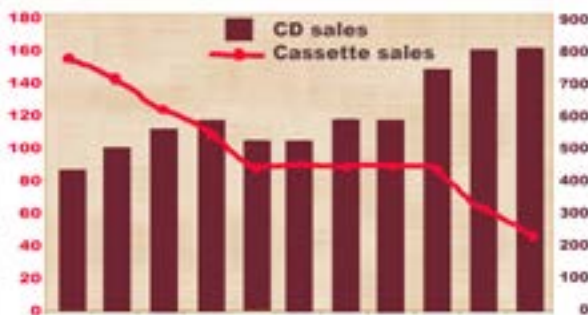
Some commentators in the period 2008-10 expressed a belief that the value-chain revolution disrupting the music industry worldwide was not affecting South Africa, because CD sales in the country were rising. This observation was based on a misconception. The uptick in CD sales was in fact the first step on the road to digital change. It represented an upgrade in South African buying habits for much recorded music – particularly indigenous repertoire – from the analogue format of the cassette tape, to the digital format of the compact disk, during most of the first decade of the post-liberation period.

Different contexts; same trend

USA: CD vs digital sales



SA: CD vs cassette sales



Some South African commentators at this time also considered changes in the recorded music industry as unconnected with the fortunes of live music. This too was misconceived, as, internationally, the rise in digital music sales has been accompanied by a reversal in the industry value-chain. The status of live music has been raised from a musician's waypoint on the route to cutting a CD, to a high-value product that is facilitated by cutting a CD.

By 2011, the local situation had changed significantly. The value of the CD music market in South Africa fell from a high of above ZAR 1800M in 2008, to ZAR1300M in 2011, with projections indicating a continuing downward trend.

'The recorded music market in South Africa has now reached the point that many other countries had reached at the beginning of the century, with spending shifting from physical to digital distribution.'¹

'Retail spending on physical formats will fall at a faster rate than spending on digital will rise, resulting in an annual decline in spending on recorded music... Spending on live music will overtake spending on physical recorded music in 2014 and total recorded-music spending in the following year. By 2017, live music will account for 57.1% of consumer spending on music in South Africa.'²

- Pricewaterhouse Cooper, 2011/2013.

Much of the rise in digital music sales has been smartphone-driven. Deloitte & Touche have estimated that above 10M smartphones were in use in South Africa in 2012 (deloitteblog.co.za 2012) and in lower-income markets many feature phones currently available share with smartphones the ability to access the web and download music. The growth in broadband access through the Seacom cables, and the efforts of the Competition Commission to reduce broadband costs are also relevant in enabling these changes.

Thus South Africa is now clearly subject to the same trends that have impacted the music industry worldwide: a decline in physical music sales and an increase in handheld device-driven digital sales, accompanied by the movement of live music here to its international place as a high-value product at the end of the industry value-chain. This has two important implications for the research:

- It emphasises the importance and urgency of initiatives to develop live touring, given the pace at which South Africa is now becoming part of international trends.
- Through the growing take-up of web-capable handheld devices, it opens new options for communication with musicians and audiences nation-wide.

Two other trends have been noted during the past three years. Firstly, since the economic downturn of 2008, Johannesburg's live music scene, which had been vibrant and a leader in innovative music – particularly jazz – since liberation (Ansell; 2004) saw the closure of many club venues and the shrinkage of city festivals such as Arts Alive. The new focus of recurring live music performance is the Western Cape, cushioned by the disposable income brought to the city by a still-booming tourism industry. This shift in focus was reflected in the 2013 research, where, for example, 43% of identified festivals were located in the Western Cape and 22% in Gauteng. Although Johannesburg had the highest number of “venues”, only 14% of these self-defined as dedicated “live music venues” (the largest group were restaurants), as compared to 39% in this category in Cape Town.

At different stages in its history, the centre of live music performance has shifted around South Africa. During the diamond boom, Kimberley's performance scene flourished; when (pre-Land Act) the prosperous black sheep-farmers of the Eastern Cape were industry leaders, Queenstown was “Little Jazz City” (Coplan, 2011; Ansell, 2004). For jazz music in particular, the scene shifted regularly between Johannesburg and Cape Town under apartheid, depending on the comparative rigour with which segregation and licensing were enforced in each place. (Coplan, 2011; Ansell, 2004; Ballantine, 2013). These fluctuations relate the South African music scene to its international counterparts; as earlier noted, UNCTAD considers volatility a characteristic of the normal operation of a creative/cultural industry. (Indeed, media reports suggest that Johannesburg may be about to reverse some of its live performance problems. (Ansell, 2013)).

Thus the direction of the latest shift itself does not necessarily impact on the research, but the fact of change over time does, for three reasons:

- Because change is a near-constant, impermanence cannot, alone, be a criterion for excluding a venue or event from future research
- But because the relative strengths of music scenes in different locations will change over time, and thus imply different funding and support priorities, it is vital that change over time is mapped. Further, policies should be flexible enough to adjust support priorities in response to findings.
- The two cities with the highest proportion of self-defined ‘live music venues’, Cape Town and Durban, both have long-term cultural planning models in operation – Cape Town's well established; Durban's rather newer. Future research might examine whether these relate causally to the vibrancy of a live scene, and whether there are replicable lessons in this.

Finally, it is worth noting that fashions in dominant music genres have changed over the research period. Kwaito, in vogue and thus a focus when the 2010 mapping exercise was conducted, is now taking a subordinate place behind various genres of house music, most recently, “Zulu” or “Durban” house. (Although the most popular download in 2012 was an “Afro-Soul” track: *Loliwe* by Zahara.) Such shifts are a normal feature of

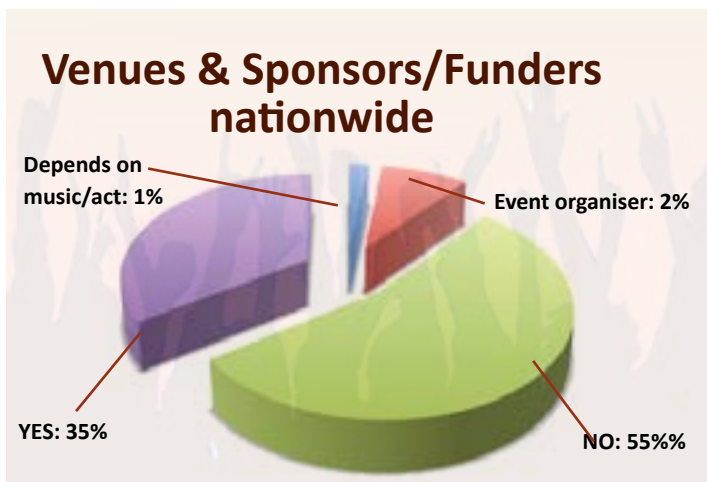
popular music and will occur often during future research cycles. They underline the need for researchers to create and employ a consistent, commonly agreed, set of genre definitions, as proposed in Section 3.4.1

The emerging evidence on the world of musicians underlines the importance of considering live performance as a key element of a vibrant music scene, even taking into account the ongoing technological revolution. But it seems that robust research – ironically – will need to find ways to account for a fluidity that seems inherent in the industry.

4.2 THE SECOND ‘WORLD’: CHANGES IN SOUTH AFRICAN BUSINESS AND POLICY CONTEXTS

4.2.1 The funding landscape: a shift to longer-term action funding

The 2010 and 2013 mapping exercises sketched the funding and sponsorship landscapes in terms of sources, listing private sector cash sponsors and overseas agencies, and noting the important role played by sponsorship-in-kind from liquor companies.



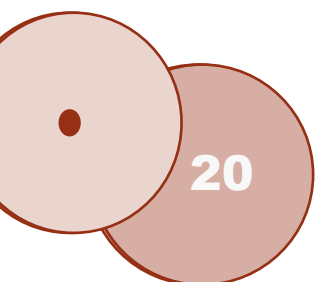
From this standpoint, as the 2013 research concluded, there has been limited change. The relative importance of named individual sponsors or funders may have changed over the period, but the broad landscape remains very similar. Standard Bank, for example, now plays a somewhat more limited role as sole sponsor of music events, having withdrawn from the Cape Town International Jazz Festival and established more extensive partnerships with others for the National Arts Festival. A new bank entrant to music funding, ABSA, now supports the KKNK. MMINO has ended its lifespan as a South African partner, but CSA sustains the relationship with Norway, while both France and, most recently China, have entered long-term cultural exchange agreements.

What this deliberate research focus on sources could not, however, uncover, were significant changes in the way funding is being viewed, and in the modalities of funding programmes.

The interest of overseas donors is shifting towards a concern for sustainability and legacy, while South African partners also seek legacy, and also now see equity as an important consideration. Exchanges, for example, must now see real work opportunities for South Africans abroad as well as subsidised performances from overseas artists. Legacy involves training and development agreements far more detailed than a commitment to a single perfunctory ‘workshop’.

Examples of this altered emphasis abound. The France-South Africa exchange programme for example has stretched over two years: the first of France in South Africa; the second of South Africa in France, culminating, among others, in a commission for South African jazz pianist Kyle Shepherd to compose and perform a work based on elements of Cape traditional music with a French orchestra.

The partnerships established by the SAMRO Foundation provide examples of efforts towards sustainability and equity. Concerts SA, the author of the 2013 mapping



research, is a joint South African/Norwegian initiative housed under the auspices of the Stakeholder Hub within the SAMRO Foundation. The project receives financial, administrative and technical support from the Norwegian Ministry of Foreign Affairs (represented by the Norwegian Embassy in Pretoria), the SAMRO Foundation and Rikskonsertene to support research and practical activities directed towards establishing a South African live performance circuit. Other SAMRO Foundation projects include:

- The Music Mobility Fund, a music touring fund for South Africans to tour Southern Africa in partnership with the British Council. The fourteen most recent successful recipients of support crossed a wide range of genres, from classical composer Mokale Koapeng to Afro-pop group Freshlyground.
- Vis-à-vis, a partnership with the Spanish Embassy and CASA Africa in Spain, is based on a “Battle of Bands” concept. The two winning bands secured a tour including five Spanish festivals
- Music In Africa, an information and exchange portal dedicated to the African music sector is supported by partnerships with the German Siemens Stiftung and Goethe Institute.

BASA (Business and Arts South Africa) is another SAMRO Foundation partner. BASA's recent work indicates how the changing concerns and modalities of funding are also affecting relationships with South African commercial sponsors – in particular, the concern with sustainability. BASA has developed an Arts Sponsorship Management Toolkit: designed to “review, refresh and enhance” (BASA website, 2013) arts sponsorship by giving companies the tools to develop, implement and manage a sponsorship strategy that is a cost-effective vehicle for both arts development and corporate branding. The toolkit also raises awareness about the options for different types of sponsorship, including sponsorship in kind. As this more sophisticated perspective on corporate sponsorship gains take-up, it is likely that live performance initiatives seeking sponsorship will be required to meet detailed planning and reporting requirements that extend far beyond simply placing an advertising banner and receiving reduced-cost liquor: another pointer towards future live music mentorship needs.

However, growing commercial sponsorship of live music beyond the historic but rather crude relationship with the liquor industry could become extremely important in future. On 20 September 2013 the South African Cabinet approved a draft Bill banning all forms of alcohol advertising and sponsorship, including at public events such as live performances.

For this research, these trends suggest that understanding the motivations of business sponsors and international donors needs to form an important element in any musician and venue mentorship, so that venues can leverage the maximum support from these sources. This includes enhancing understanding of the value of sponsorship in kind (such as transport and accommodation for touring musicians). This is particularly true for smaller, less well-resourced venues. More than half of the venues surveyed in 2013 did not receive any form of sponsorship or funding.

In addition, the impact of an end to liquor advertising could prove a major blow to circuit planning. For small venues, and smaller, local festival-type events, the fastest and simplest recourse for sponsorship is the liquor industry – although there are social as well as business reasons why this may not be the most desirable or sustainable strategy. Future research needs to project how much revenue will be lost to live music through the ban (the estimated loss for sports is ZAR 4.3Bn) and what the options for sponsorship substitution are.

“[There is] very little understanding from all three tiers of government on the nature of live music and the development of music. A lot of lip service is paid to it, but very little cash and resources ever actually trickle down to emerging acts. We are sadly seeing the emergence of more and more red tape from different tiers of government that is starting to add administrative burdens to the running of our core business – the sale of alcohol and food – which might result in the closing of the music programme.”

- interviewee 2013



4.2.2 Policy: consequences of standardised reporting

It is often hard for political policy-makers to discuss the practicalities of the cultural and creative industries. They are bound by sets of generic reporting frameworks which are vital for consistency: frameworks that can best be filled by reporting on concrete deliverables such as the construction of fixed physical infrastructure. Yet these frameworks do not necessarily fit every area of policy activity equally well. As UNCTAD has noted: “The great value of [conventional economic] accounts is that they present data...directly comparable with other sectors... [But] this is also a weakness, since it assumes ...that the creative economy is precisely the same as the rest of the economy” (UNCTAD, 2008).

Accommodating these tensions between consistent cross-departmental reporting needs and the unique characteristics of the arts in ways that will satisfy administrators and financial managers are apparent in the three most important strategic policy documents of the period in question: the *Department of Arts and Culture Strategic Plan 2011-2016*; the *National Development Plan [to] 2030*; and the new *Arts Culture and Heritage White Paper*, published this year. To speak to administrative and reporting needs, the arts are predominantly dealt with through a teleological approach; in other words, they are discussed largely in terms of what they can produce – economic growth, jobs and more – rather than in terms of their process needs.

While for a country like South Africa, developmental results from any government investment are vital, this ends-driven, big-picture approach leads to a policy focus that reifies quantifiable infrastructure outputs. Less attention is given to the intangibles which cannot be measured (enhanced aesthetic awareness, vigorous debate towards social cohesion) and to the detailed resource needs of creators during the process of production: in, for example, the composers’ studies, rehearsal rooms, clubs and festival stages where music is actually made. This focus on certain types of deliverables can – as has been observed in other funding contexts – stimulate grant-reactive behaviour, where arts implementors do not consider innovative options, but cling to the types of projects that ‘tick the boxes’. Of all the documents, the National Development Plan attempts the most balanced and practical analysis.

THE DAC STRATEGIC PLAN 2011-2016

Action proposals are aligned carefully to abstract national, rather than concrete field-specific, policy goals, in terminology such as “to utilise arts and culture to...” Because sub-programmes tend to aggregate arts fields into broad categories such as “multidisciplinary” or “performing arts”, not many individual music-specific proposals appear. However DAC’s strong endorsement of the perspectives of the current mapping research is evident in a promise to “create a conducive platform for local music-makers” (DAC 2011 : 38). (Albeit that the benchmarks for this objective are limited in the document to support for the national, but Johannesburg-based, Moshito Music Conference and the physical infrastructure of Johannesburg’s Downtown Studios.)

THE WHITE PAPER ON ARTS CULTURE AND HERITAGE

This document operates within a much more ambitious but generic set of parameters: “the role of DAC and the Cultural and Creative Industries in building a just, prosperous, inclusive, morally proud and cohesive society at peace with itself and the world; is translated into the White Paper as policy intent.” (Govt of SA, 2013)

The White Paper shares with the DAC strategy a positive concern to offer cultural practitioners “increased access to markets and development opportunities” and also expresses the need to see “new international partnerships built and existing ones strengthened; and partnerships built with tertiary institutions to develop and offer cultural and creative Industries-related courses.”

All of these goals, if realised, could offer significant support to the development of South African live performance. (The 2013 research has noted, for example, how improved sound technician training has already contributed to an improvement in sound engineering in venues.)

THE NATIONAL DEVELOPMENT PLAN 2030

A perspective that balances views of the arts as a space for debate as well as a means of economic development is offered by the National Development Plan, albeit in a brief, one-page overview:

“Arts and culture open powerful spaces for debate about where a society finds itself and where it is going. Promoted effectively, the creative and cultural industries can contribute substantially to small business development, job creation, and urban development and renewal.” (National Planning Commission 2013).

The NDP’s practical proposals also include a raft of measures which speak directly to current concerns raised in the 2013 mapping report. These include:

- Providing financial and ICT support to artists to enable the creation of works expressing national creativity, while opening space for vibrant debate. (*Mentoring musicians towards digital readiness*)
- Incentivising commercial distribution networks to distribute and/or host art. (*Supporting venues*)
- Developing and implementing plans for a more effective arts and culture curriculum in schools with appropriate educator support. (*Growing skills*)
- Supporting income-smoothing for artists in a special unemployment insurance scheme and evaluating funding models for such initiatives. (*Tackling the industry’s seasonality patterns*)
- Developing sectoral determination legislation frameworks to protect arts-sector employees.” (*Dealing with irregular payment and promoters’ commission arrangements and problematic conditions of employment*)

The approaches expressed in policy documents are important not only to inform the mapping research, but also to guide future action on live music development. Three aspects in particular are relevant:

First, live music is embedded into the broader music industry, and many of the steps needed to improve the quality of live music will improve the sector generally.

Second (and perhaps an important example of the point above), music practitioners need to learn the language of policy and economics. Communications with government (funding applications, reporting, etc.), need as far as possible to reach out to official information needs and perspectives, including the quantifiable impact of activities. This aspect also needs to be covered in mentoring programmes for music organisers.

Finally, there is also a role for advocacy directed towards broadening official perspectives to better accommodate non-standard cultural industry business practices and understanding of the less easily quantifiable benefits of music activities.

4.3 THE THIRD 'WORLD': CHANGES IN INTERNATIONAL MUSIC SYSTEMS AND PERSPECTIVES

4.3.1 Technology: the potential enhancement of access

Some of the enhanced opportunities for live music offered by improved technology have already been discussed: in particular, the way that internationally manufactured, smaller, lighter and cheaper digital technology has assisted venues to become better equipped with sound and PA equipment between 2010 and 2013.

The growing relationship between digital and live music is, however, now developing further. Even if South Africa does not yet have the level of digital connectivity of many European countries, the potential exists to implement such options here in the future.

Artists overseas have begun crowd-funding their live events (sourcing investment or advance payments via the Web), and using transactional websites to collect ticket fees. (<http://.researchmozus,2013>) Payment via website has already been taken up by, among others, the Oppikoppi Festival in South Africa and as of 2014 will be adopted by the National Arts Festival in Grahamstown (NAF 2013).

As well as finance, web technology can also be employed to source contacts and build fan communities. The UK-based Glastonbury Festival 2013 was perhaps the most social media-involved live event in the world so far, attracting 1.7M social media communications and becoming, in the words of one commentator "a second screen to the festival" (<http://fourthsource.com,2013>). Interaction between fans and artists included performers such as Mick Jagger sending out backstage Instagram images to fans. Involving non-attendees in a concert or festival leverages publicity for future events from a live show, something that could enhance the buzz along the route of a circuit tour. For South African artists, such techniques also permit them to use local live shows as a means of connecting with a global audience.

All of these developments are "reshaping the boundaries of live performance" (Bennett, 2012). South Africa has a record as a 'fast follower' that can leapfrog over intervening stages to make relevant use of innovations as the technological climate permits. For this reason, future research should continue to observe and record these new approaches, and monitor industry innovation leaders such as Oppikoppi for lessons that can be disseminated through the industry more widely.

4.3.2 The world industry: transforming touring and performance models

Historically, the focus of performance and tour planning worldwide has been the supply side: that arts 'product' exists and that there are venues that can meet conventional requirements for hosting it. However, the late 20th and early 21st century have seen

significant changes in the demand side – audience behaviour – which suggest that this focus may need modification. The blurring of the boundaries of live performance discussed above, are only one aspect of these changes.

Expanded literacy (a very important development in post-liberation South Africa) and media access, including access to broadcast and digital media, have diversified audience tastes and activities. In the digital world, music (including live music) is a ‘Long Tail’ activity: it becomes possible to cater effectively to a range of demand niches, “selling less of more” (Anderson, 2004). In addition, there has been blurring of the distinctions between supply and demand and producer and consumer with the development of audience-driven web content and tools, with examples ranging from top trends on Twitter to the development of Linux software.

South African music consumers participate in these trends, even if their ability at present remains hampered by cost and access factors.

In this context, arts marketers are moving towards a new way of viewing live tours: as ‘audience-centred touring.’ Rather than fitting touring plans around the requirements of available product – the paradigm that guided particularly the 2010 mapping research – this approach tailors touring to the needs of potential consumers.

Studies from Canada (Canada Council for the Arts, 2009), Australia (Queensland Arts, 2008), Ireland (Irish Arts Council, 2010), and elsewhere all suggest strategies that put demand at the beginning of the planning process.

This has important implications for both implementation and research. Queensland Arts, for example, faced with the need to take arts to remote rural areas, proposes:

“Touring circuits and programmes should include non-traditional performance and presentation spaces, such as outdoor public spaces, school halls and libraries...Communities are not passive consumers of content but can be active participants in presenting , publicising and selecting content.”

The Irish Arts Council (which like South Africa serves a rural constituency and has a significant body of traditional, non-English culture to showcase) suggests that audience-centred touring needs to adopt a relationship marketing approach: not simply selling shows, but building longer-term contact with potential attendees:

“[We require] arts marketing that encourages consumption and explains distribution...[We need to discover] what soft infrastructure is needed to attract, engage and retain audiences” as well as how to brand tours as a distinct audience experience.

Adopting an audience-centred touring strategy also requires another realisation, that affording access – an objective of both the 2010 and 2013 research initiatives – means more than placing a show in a particular location and opening the doors. It means actively enabling the audience. This potentially encompasses a very wide range of strategies from employing community activators to encourage attendance, through subsidised ticket prices, to community arts education about formats and genres. In this context, it may be instructive to look at the experience of Brazil, which has had one of the most successful experiences of fostering non-formal music touring



CSA - Frank Paco, Durban



*CSA School Circuit Programme: Native Groove Collective at Alexander Sinton High School, Cape Town.
Photo: Eugene J Arries/Musicpics*

circuits. In Brazil, the non-formal circuits have developed over the past 8-10 years from separate regional initiatives in townships and poor rural communities to a national network generating \$44M annually for live music, with its own bank, currency and ‘free university’, and seats on government policy panels.

Brazilian music in the early 2000s was in a very similar position to South Africa now. The digital industry revolution had begun and there was wide debate about issues such as how musicians could earn from their music. In impoverished favelas (townships), real work in music was scarce, and earnings low. Further, across a large geographical area, the market was fragmented into multiple popular genres appealing to diverse local tastes.

Brazil was different from South Africa in two important respects: broadband was more accessible and significantly cheaper; and government policy was changing its approach to the music industry. Under President Lula da Silva (and with musician Gilberto Gil as Minister of Culture), cultural spending was gradually being decentralised with the explicit objective of giving civil society bodies a role and voice in its disbursement.

In different parts of the country small groups of Brazilian musicians – not stars, but the ‘musician corps’ described by Birkholtz – began to develop different kinds of self-help initiatives, taking many forms, but mostly combining digital technology with live performance to some extent, and relying on non-formal performance settings.

Some musicians cut tracks to use as cellphone messages publicising gigs. In Belem, tecno-brega musicians “have turned to economic models involving live performance to make the bulk of their income.” (www.southerninnovator). Tecno-brega (“cheesy techno”) was Brazil’s equivalent of kwaito: a mix of home-cut digital and live sounds. Musicians used cheap self-recorded CDs as publicity for big open-air sound system parties; and worked together in deciding which band would perform when and where. A musician’s monthly income from such a gig could be up to four times Belem’s minimum wage.

Elsewhere, urban rock musicians 'sold' shows to a studio owner to make demos, then paid him back from the proceeds of their live show. Where no cash was available, they evolved a system of service exchange – for example, session work in return for recording time. Many other business models also evolved.

In 2005 ABRAFIN (the Brazilian Circuit of Festivals) and Circuito Fora do Eixo (the 'off-axis' circuit) were established to bring these initiatives together, and to begin to facilitate collaboration and exchange on a national scale. Because it was rooted in by now-established local collectives, the movement took off. Today, it attracts audiences ranging from a few hundred to tens of thousands to a range of events, many of whose profits are ploughed back into live music development. Musicians rapidly dropped their initial, desperate "we'll have to do it ourselves" slogan for the new "Let's do it together." Representatives of the two national organisations now sit as part of the 17-member Brazilian Music Network, which creates a direct conversation between government policy-makers and representatives from every segment of the music industry value-chain.

Talles Lopes of the Off-Axis Circuit describes other broader gains:

"As of a few years ago, the "best albums" list reflects predominantly independent artists from all regions of Brazil. By way of further example, taking into account only those events organized by Fora Do Eixo, more than 30,000 artists circulated through the network of festivals in 2012. Its most ambitious festival, Grito Rock! (Scream Rock!), occurs in 200 interconnected cities with over 3000 shows -- all in a single month. Several Brazilian states and municipalities have begun to develop specific policies related to independent music, such as Música Minas (from the state of Minas Gerais) and Terrua Pará (from the state of Pará). And some companies have started to invest in programs specifically for the promotion of independent music, like the Vivo Connection program (from the Brazilian telecomm company, Vivo) and the multiple grants earmarked for independent artists and music festivals by Petrobras, Brazil's largest and semi-public (oil) company. Networks and network "families" proliferate in Brazil, and an independent circuit increasingly gains strength and solidifies itself as a reality. Out of this trunk, a new form of artist is awakened and this movement helps the emergence of a new way of thinking and doing politics..." (<http://unconventionhub.org> 2013)

No model can be transplanted directly from one country to another. But study of the Brazilian model may offer important learnings for South Africa because:

- It is meeting official policy goals of creating sustainable livelihood for musicians and building social cohesion
- It draws on a tradition of informal community music organisation in collectives that is similar in many ways to South African traditions such as stokvels and isicathimiya circuits
- It puts audiences and their tastes at the centre of circuit planning structures
- It takes advantage of the new opportunities offered by digital while preserving live performance and distinctive or historic regional musics.

Such examples, and new thinking about audience-driven touring suggest that future research should take as inclusive a view as possible of non-formal structures and venues in townships and rural areas as part of its work. In addition, they may offer alternative models of interaction with policy structures.

4.4 SUMMARY OF THE IMPLICATIONS OF CONTEXTUAL CHANGE FOR THE CSA LIVE MAPPING PROJECT

4.4.1 Sources of support for future circuits

Be aware of the changing priorities of sponsors, funders and policy-makers. Learn to speak their language and include tips on dealing with this in mentoring programmes.

- Consider advocacy to enhance the flexibility of government's approach to the arts.
- Map digital innovations relating to live performance and follow leading innovators on the South African live scene for replicable lessons

4.4.2 Categories and parameters for future research

- Map change over time as well as across geography. Live music mapping should become an annual resource, both by utilising online survey tools such as Survey Monkey and through action research as touring plans are implemented.
- Given the weight of international evidence underlining the volatile and flexible nature of the cultural industries, hard research definitions and exclusions need to be constantly re-evaluated for usefulness. This is particularly important in the light of the 2010 and 2013 findings about the paucity of rural and township venues.
- Research a range of models for interaction with policy-makers, and policy makers' interaction with cultural industries, including the utility of long-term cultural planning models.



Herbie Tsoaeli,
drawing by J. Seidman, 2006

4.4.3 Priorities for future research

- As a matter of urgency, investigate the impact of the proposed liquor advertising ban on live music, and the options for sponsorship substitution
- Since live music increases in importance as digital industry transformation advances, and since those changes are clearly now affecting South Africa, speed is called for in advancing CSA's work.

4.4.4 All-round perspective on understanding live touring

- Map relevant academic research further to augment the limitations noted in this research.
- Since scholarly research has already been conducted into the perspectives of musicians, audience research should be a priority in creating a 360-degree view of live performance.
- Explore relevant overseas examples for transferable knowledge.

CHAPTER FIVE:

CONCLUSIONS



Princess Magogo with Uqubu by George Velaphi Mzimba 1959

The 2013 CSA Live Mapping Project provided a snapshot of a diverse and lively South African urban music scene. There was activity at both long-established and a high proportion of new (particularly smaller: below 500-capacity) venues. Venues were serving performers and audiences better than had previously been observed: operating with an awareness of music and liquor licensing requirements; providing backline, PA and sound engineering services more frequently, and adapted to digital (card) payment practices.

However, there had been little or no development in certain aspects vital for the sustainability of the scene: sponsorship and funding (although some new modalities and priorities were in place); payment arrangements with musicians; the geographical imbalances in the distribution of festivals; and lack of township venues.

Bringing this local picture together with relevant literature and international experience allows us to see how the 'snapshot' produced by the study relates to the broader music-industry world. There have been major disruptions in the technology that supports music, and in the industry value-chain, and although all these have been felt in South Africa, their impact, both immediate and potential, is different in relation to different types of venues.

5.1 IMPACT OF DISRUPTIVE MUSIC INDUSTRY CHANGE

Change	Larger, more formal venues	Smaller, more flexible venues
Live music is more important in the value-chain	Highly relevant; positive impact	Highly relevant; positive impact
Improved technology makes equipment more accessible and portable	Less relevant. Increases flexibility of stage and sound provision, but long-term budgeting and heavy use mean durable technology already part of operations	Highly relevant. Makes space and cost considerations less constraining. 2013 findings confirm this.
Digital realm offers additional mechanisms for marketing	Relevant, but risk that larger, older institutions may be locked into path-dependent marketing, with strategies weighted towards older (print, broadcast) technologies	Highly relevant. Social media and wide distribution of cellphones offer a cheaper, more flexible marketing path that can take advantage of audience as well as venue networks

<p>“Long Tail” fosters fragmentation of audiences into taste-defined niches</p>	<p>May have negative impact. More established formal life may have tied venue to one specific cultural identity, or cast it as a ‘neutral platform’ with no distinctive marketable identity. <i>(This is not however true of multi-platform festivals which can market to multiple niched audiences under one identity umbrella.)</i></p>	<p>Highly relevant; positive impact. Small venues have greater flexibility to shape the identity of their platform and market attendance at their live events as part of membership of a specific taste community.</p>
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[They] “... are supposedly the patrons of the arts, why does support stop at tertiary level or the occasional big event? Why are the clubs who are in the trenches, holding the flag and running with the drummer boy, the ones who are not supported? It is the heartbeat of the music that exists in the clubs.”

-interview, 2013

The issue of identity and taste-defined niches is particularly relevant for South Africa. Live music today is a ‘long-tail’ product. While it is not necessarily digitally marketed (although it very effectively can be, see Section 4.3.2), peer recommendation systems linked to perceptions of community and identity allow consumers to learn about non-mainstream products. In this way, some demand shifts from mass-market products at the head of a demand curve to the combined power of a ‘long tail’ comprising the aggregate demand for multiple different products: live *isicathimiya*; live Afrikaans rock; live improvised jazz and more. This makes consumption niches both possible and (in business terms) necessary. As Bennett (2012) has demonstrated, the choice of listening becomes an expression of cultural identity, with the notion of ‘belonging’ core. The act of attending live music becomes an aspect and extension of identity formation.

For South Africa, however, the problem is that this takes place on a scarred landscape, where platforms are very often not neutral, and may often be associated with an exclusionary set of meanings. As an example, two decades ago music scholar Brett Pyper was appointed ‘Head of Light Music’ at the State Theatre in Pretoria, which was run by the Performing Arts Council of the Transvaal (PACT): an institution with a reputation as a pillar of the pre-1990 state. Part of his remit was to introduce more diverse, jazz and African, music. However, he reflected that his title seemed to mean to many: “the music that PACT takes lightly.” (*conversation with H. Barnard, 2011*)

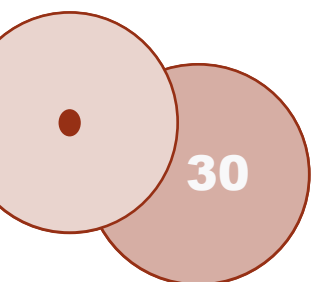
In this context, smaller and newer venues may have an image and marketing advantage over their more formally established equivalents.

This contrast becomes more marked when we consider the question of sustainability for a South African live touring circuit. In his seminal text *Marketing Management: analysis, planning and control* (Kotler, 14th edition, 2012), Philip Kotler posits that contemporary principles of effective marketing are applicable not only to physical products, but to ideas, and to experiences such as live music. If we apply Kotler’s principles to the situation of live music, they suggest that audience-led touring models have a great deal to offer in South Africa.

5.2 DRIVERS OF SUSTAINABILITY FOR A LIVE CIRCUIT

Supply-side models only deal with one half of the touring conundrum. However musically credible, effectively administered and congenially located a series of travelling concerts may be, sustainability is not guaranteed. Three dimensions are central to a sustainable live touring circuit:

- DIMENSION ONE: it must provide a livelihood for musicians;
- DIMENSION TWO: it must keep venues profitable enough to continue operating within their chosen business model (whether this is more or less formal); and thus
- DIMENSION THREE: it must regularly attract and involve an audience.



Income related to audience may be direct (through ticket sales); indirect (through refreshment or other sales); or arms-length, where concert costs are subsidised to afford access for a particular social segment. As we have seen in Chapter Four, funding conditions are becoming more stringent and sponsorships from some sources are under threat. In any case, no commercial venue can claim to have a sustainable business model if it is continually dependent on sponsorship – and in the 2013 survey, less than one quarter of South African venues nationwide were in categories (government, non-profit, NGO) where subsidy could justifiably persist as a major element in income.

Thus, since audience must be the keystone of sustainable touring, consideration of marketing options and strategies becomes extremely important. Kotler frames marketing strategy within “Four Ps”: product; price; place; and promotion. Considering each of these in the light of both South African findings and industry context changes offers the following perspectives on the dimensions of sustainability.

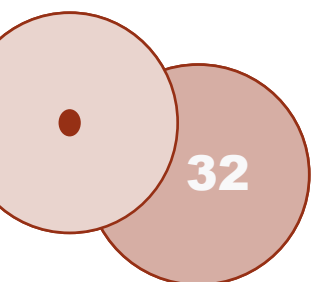
	Larger, more formal venues	Smaller, more flexible venues
PRODUCT	The right product to satisfy the demands of the target audience...	
Musician livelihood	Audience expectations or nature of infrastructure (big stage/auditorium must be fully utilised) may pre-determine opportunities for some artists	Audience expectations and infrastructure limitations also exist but...
Business model	More expensive to implement risky innovations	...risks are more affordable
Audience	May have an arms-length relationship with a larger but more irregular audience across a wider distance, making needs identification harder	Because they serve a smaller & more niched community, can identify – and match product to – audience interests
PRICE	at a price which balances audience ability to pay with business model sustainability needs...	
Musician livelihood	Flexibility may be hampered by pre-determined payment rules May be able to offer higher fixed fees	Fewer pre-determined pricing & payment rules Can offer flexible payment deals tailored to the event – but these may sometimes be inadequate
Business model	Start off from a higher cost-base; high overheads But can cross-subsidise between events	Carry fewer costs incidental to each individual project; lower overheads Fewer options for cross-subsidy
Audience	Often governed by pre-determined ticket charges which may deter audience from novelty	Can adjust ticket cost more closely to costs of individual event Community/identity benefits may outweigh audience fear of novelty

PLACE	... accessible to the target audience...	
Business model	Need to invest in a gig rig to bring music to audience Set up to accommodate travelling artists May be the sole possessors of infrastructure for certain large events and can leverage income from this	Serve a smaller audience but close to that audience May not have budget to bring musicians to an area or infrastructure for certain large events, but... Cost-sharing between small venues can reduce tour overheads
Audience	Fixed metropolitan location Inadequate or costly transport from rural/township areas may act as a barrier to access Perceptions of institutional identity may also deter attendance/ ("Not for people like us.") Risk of exposure saturation	Already located in many diverse non-metropolitan settings including township and rural settings While an individual small venue may have a fixed perceived identity, sharing an act between small venues can circumvent perceptions, improve access and mitigate exposure saturation
PROMOTION	...who are able to find out about its availability, price and location	
Business model	Budget for conventional marketing and relationship with media sponsors, but	May have limited conventional marketing funds but
Audience	...risk of path-dependent marketing that may not reach outside usual audience	...because they serve a smaller & more niched community, can package marketing to ensure the event appeals; can use flexible mix of digital marketing approaches; and community makes effective relationship marketing possible

Thus it becomes clear that larger fixed-infrastructure music venues and smaller, less formal venues can play complementary roles in a touring circuit. Larger venues offer unique infrastructure for certain types of large-scale events, and possess a fount of institutional knowledge about organising music events. However, for such venues novelty poses a financial risk, and because of their commanding positions – often in metropolitan centres – they may pose problems of access for some audiences and saturate others with similar programming over time.

Smaller music venues offer platforms for exposure in multiple areas including many outside metropolitan centres. Thus they offer a route for overcoming the geographically unbalanced distribution of venues noted in both 2010 and 2013 research. Their costs for risk are lower, their business structures more flexible, and a close relationship with their audiences means that information to place the right product on stage is more accessible. Disadvantages relating to the high cost of conventional promotional activities have been overcome through the availability of digital platforms especially social media. Adopting a more inclusive approach to such venues may have important implications for mentoring and other forms of capacitation as part of implementing live music touring, and will require flexibility from both parties.

For this reason, the recommendations in Chapter Six include approaches and actions that will make it possible to integrate different types of music venue in a South African touring circuit.





Colour Bar, detail, J. Seidman 2006

CHAPTER SIX:

RECOMMENDATIONS

At the outset of this work in 2010, the study worked from the assumption that a clear distinction could be drawn between formal, permanent music venues and their non-formal cousins. Bringing together the results of the 2013 study, which worked from a bigger database and a more flexible framework of definitions, with the insights of local and international scholarship, CSA has concluded that the distinction is a matter of degree rather than kind: live performance venues lie along a continuum from the highest degree of formality and permanence, to still effective but sometimes more unconventional entities.

The CSA policy remains valid: any location in a circuit needs a clear commitment to growing live music and a willingness to host different genres – although local market demand is also a consideration regarding the latter. Additionally, there is no reason why CSA's need to establish a proven track-record should not extend, for example, to the half-century history and organisational record of a township jazz stokvel. Such increased flexibility would, in fact, make it more viable to realise other policy objectives such as ensuring a large, diverse audience is reached and artist saturation is kept to a minimum.

The recommendations below apply to relationships with potential live music venues operating at all scales, and make it possible to take the findings of the research forward in terms of genuinely action-oriented strategies, without excluding many township and rural venues and events from consideration. Correcting the imbalances in location and access noted by both the 2010 and 2013 studies becomes possible. In fact, at this stage in our understanding of how live circuits can survive and thrive, it further becomes possible to conjecture that many of the real growth opportunities in a developing-country context such as South Africa, lie in capacitating smaller venues including those in township and rural locations.

6.1 RECOMMENDATIONS REGARDING RESEARCH

Recommendations for research can be summarised as dealing with enriching current findings, and developing new research paradigms. Enriching current findings is particularly important to strengthen advocacy arguments around the short to medium term phase of live music implementation; the new areas broaden and deepen understanding for the long term, and give SAMRO-specific areas greater research autonomy.

6.1.1 Enriching current research

- As a matter of urgency, investigate the potential impact of the liquor advertising ban and the options for sponsorship substitution
- Map the potentially useful findings of current music scholarship;
- Conduct complementary audience research to augment existing knowledge of venues and performers;

- Advance from desktop to live research on festivals;
- Probe attitudes to promoters and diverse promotion models (Appendix One) more deeply; and
- Develop stronger data-sets for information-gathering around genre.

6.1.2 Additional areas of and approaches to investigation

- To capture change over time, make live music mapping a regular exercise;
- To accommodate change over time, regularly re-evaluate research definitions and parameters;
- To broaden access for artists and audiences, pay particular attention to capturing information on smaller venues and non-conventional performance spaces, in particular rural live music opportunities;
- Develop “offshoot” (single-focus, shorter-term) research projects to probe SAMRO-specific aspects such as attitudes to music licensing; and
- Make use of digital research tools such as Survey Monkey where appropriate

6.2 RECOMMENDATIONS REGARDING PLANNING AND IMPLEMENTATION

These practical proposals deal with both the conceptual framework for creating effective live touring circuits, and the (essential, albeit sometimes basic) physical steps required to realise those plans. The latter are the tools for achieving the objective of this research: a diverse, sustainable and accessible live touring scene.

6.2.1 Creating more responsive planning frameworks

- To bridge inequality gaps, construct a touring matrix that builds on the complementarity of larger and smaller venues;
- Investigate relationship marketing tools for tours such as online information networks, memberships, season tickets and group discounts;
- Enhance the understanding of and scope for sponsorship in kind; and
- Work with partners such as BASA to improve engagement with funders’ and sponsors’ perspectives;

6.2.2 Developing concrete resources

- To maintain standards, conduct inspection trips and audience investigation before placing an act in a venue known only through survey information;
- To protect standards, develop pro-forma contract blanks for use in setting up tours, specifying for example technical requirements, artist treatment/facilities and other aspects highlighted by the research;
- Build on the greater accessibility of technical equipment and qualified sound engineers by developing databases of such resources per locality;
- To better serve township and rural areas and reduce act saturation, capacitate smaller and less formal venues by upgrading infrastructure and/or mentoring in technical skills such as event management, sound engineering, and inexpensive (digital) marketing tools;
- Investigate ‘gig rigs’ and ‘gig packs’ as ways of augmenting tour infrastructure in under-served localities; and
- To ensure genuine access, seek partners for initiatives such as community arts education that can encourage audience growth and participation outside city-centre areas.

6.3 RECOMMENDATIONS REGARDING BROADER ENGAGEMENT

These recommendations consider advocacy and partnership options with peers and policy-makers, particularly the SA government. The arts do not function in isolation and both international best practice and the findings of this and other research underline the importance of a conducive context for a sustainable live music circuit.

6.3.1 Engagement with partners

- Identify, monitor and engage with South African industry innovators and relevant overseas initiatives for transferable learning;
- Build wherever possible on the real synergies with the National Development Plan arts proposals; and
- Investigate the utility for live music growth of city cultural planning models and industry-government discussion forums.

6.3.2 Advocacy with policy-makers

- lobby for the most favourable tax/policy climate for resourcing smaller venues and fostering venue opportunities in rural and township areas; and
- foster greater understanding of and a more flexible approach to industry-specific modes of business practice.

In short, these recommendations are co-dependent on each other. Musicians' livelihood, the sustainability of a venue's business model, and the active involvement of an audience require action at the research level to enhance understanding, at the resource level to improve efficiency, and at the policy and advocacy levels to foster a more conducive environment for live music.



CSA Venue Circuit Programme: Siphon 'Hotstix' Mabuse at Niki's Oasis, Johannesburg



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Mandla Mlangeni, SAMRO, photo by Suzy Bernstein



APPENDIX ONE:

ADDITIONAL FINDINGS OF THE CSA MAPPING RESEARCH

This report has highlighted those aspects of the 2013 CSA research findings most directly focused on the creation of a live touring circuit. However, the research also gathered information broader than this: on the operation of individual enterprises, on the relationship with SAMRO and on other matters. We summarise this information below. In addition, we include here the information on music genre. As we acknowledge in the main report, without a tighter data-set explicitly shared between researcher and research subject, the value of this data remains provisional only when embarking on the practical organisation of tours, although it establishes a useful broad foundation.

Type of business by percentage

	c.c.	Local govt	NGO	Pty(Ltd)	Non-profit	Sole proprietor	Parastatal
Cape Town	8	12	8	24	-	12	-
Durban	18	6	18	24	24	-	-
Jhb	18	10	-	46	5	3	3 (*SABC)

Licensing : Liquor licensing nationwide by percentage

By arrangement	8
Licensed	78
No	12
"In process"	1
Bring your own bottle	1

Awareness of music licensing requirements nationwide by percentage

Yes	82
No	13
By arrangement	5

Receipt of sponsorship and funding nationwide by percentage

Yes	35
No	55
Event organiser	9
Depends	1

Use of promoters nationwide

Yes	36
No	50
Rarely	2
Occasionally	7
Event organiser	3
No, audition own acts	19



CSA - Herbie Tsoaeli

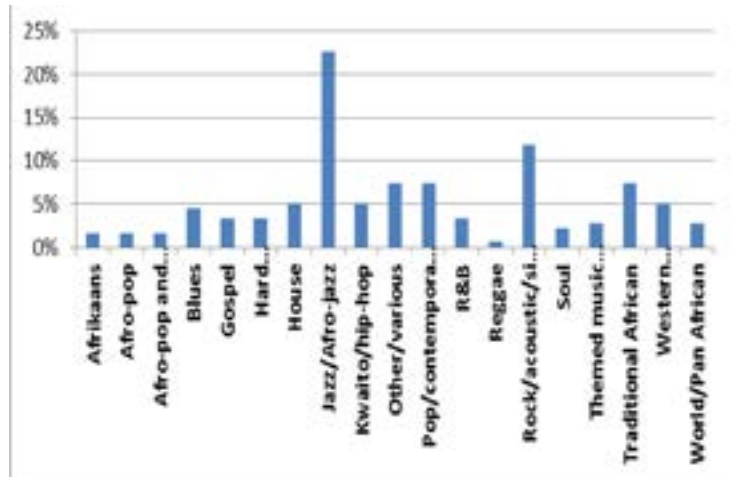
Payment arrangements for musicians by percentage nationwide

Door deal	33
Guaranteed fee	27
Venue for hire	16
Free	1
'Other' & unwilling to discuss	23

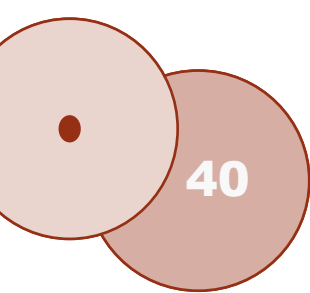
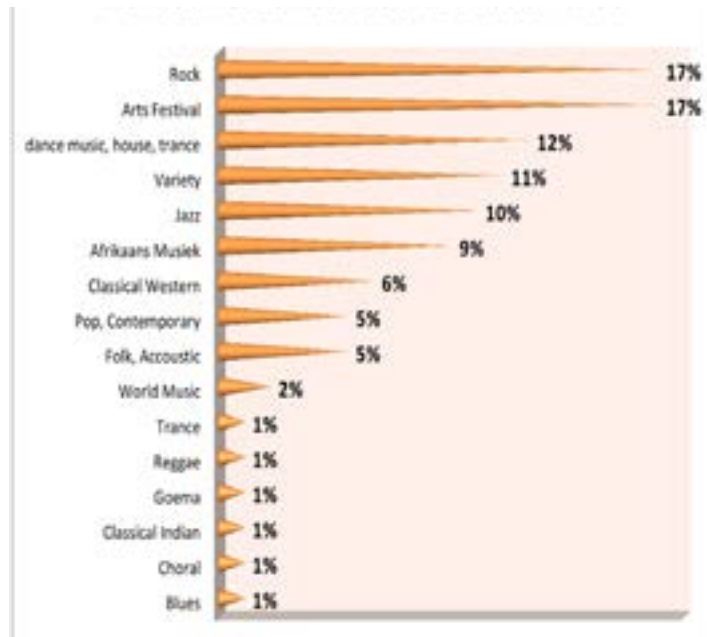
Use of international acts

	Yes	No
Cape Town	80	20
Durban	41	59
Johannesburg	30	70

MUSIC GENRES IN VENUES NATIONWIDE



MUSIC GENRES BY FESTIVAL NATIONWIDE



APPENDIX 2

RECOMMENDATIONS: A HISTORICAL POSTSCRIPT

When the South African government convened the multi-stakeholder Music Industry Task Team in 2001, live performance was only one of the areas it investigated. However, contributions on the topic were vehement. There was insistence that live performance opportunities be expanded and democratised; that geographical imbalances of opportunity and access be redressed, and that working conditions, contracts and remuneration be upgraded. As this research has demonstrated, many of these concerns remain.

Since then, a great deal about how the industry operates had transformed, both in South Africa and internationally. Many of the institutions, role-players and phenomena discussed no longer exist in that form. Paradoxically, some of the disruptions that have taken place offer new options for dealing with persistent concerns. In particular, new understanding of the industry's need for flexible approaches as part of its business model makes it easier to envision how small, township, rural and informal performance opportunities can be accommodated within strategic planning going forward. Below we highlight the relevant MITT proposals regarding live music, and how these relate to our current findings and perspectives.

Music Industry Task Team Recommendations re live music 2001	Relationship to current findings and recommendations
Recommendation 4: Broaden the definition of 'performer' to accommodate indigenous and folkloric performances	Acknowledged in the proposal to build on indigenous/traditional performance circuits and non-conventional venues
Recommendations 10, 12 & 13: Investigate/upgrade the status of musicians in relation to legislated provisions on work status, working conditions etc and contract provisions	Supported by the proposal to develop standard contracts and other touring documents
Recommendation 14: Develop social security provision for musicians	Supported by the proposal to work in synergy with NDP on this aspect
Recommendation 19: Tax incentives for the arts	Could form one of the specific measures recommended as part of supporting small venues
Recommendation 22 Incentives for establishing live music venues	As above
Recommendation 23 Music industry companies to use social responsibility and sponsorship funds for the development of musicians	Could be applied in developing sponsorship in kind, and the various forms of industry mentorship listed in 2013 report
Recommendation 29 Improve baseline economic data	This research makes a concrete contribution to data

<p>Recommendation 30 Music Industry Cluster to develop a long-term industrial strategy</p>	<p>Although the Cluster is less apparent as an active force than 12 years ago, this report contributes to long-term strategy, while the experience of Brazil and of cities in SA with long-term culture plans demonstrate what a more active cluster could achieve</p>
<p>Recommendations 33/34 Develop industry infrastructure outside metropolitan concentrations (in 2001, Gauteng)</p>	<p>This research demonstrates that the focus of live industry activity has shifted from Gauteng to Cape Town. In addition, current international best practice de-emphasises fixed infrastructure and offers ways of building on less formal music institutions to improve geographical spread of access to live performance</p>
<p>Recommendation 37: Local/provincial/private partnerships to link music to urban regeneration & tourism initiatives</p>	<p>Supported by findings on long-term cultural planning and international best practice, and by the demonstrated growth of Cape Town as a live hub.</p>

