

It starts with a heart beat



**CRAFTING A MODEL FOR LIVE MUSIC SUPPORT
IN SOUTHERN AFRICA**

CONCERTS SA DISCUSSION PAPER 2016

This report was compiled and written by Gwen Ansell on the basis of original research into Live Music Audiences conducted by Elizabeth O'Connor at the University of the Witwatersrand during 2014/15, supported by Concerts SA. Gwen Ansell is a freelance music writer and music industry researcher; author of the seminal cultural history work, *Soweto Blues: Jazz, Popular Music and Politics in South Africa*.

Thank you to our funders and partners for their generous support:

- Norwegian Ministry of Foreign Affairs (represented by the Royal Norwegian Embassy in Pretoria)
- SAMRO
- SAMRO Foundation
- Concerts Norway (Rikskonsertene)

Special thanks to:

- Elizabeth O'Connor
- School of Arts, University of the Witwatersrand
- All interviewees, venue owners, artists and promoters who gave time and generously shared ideas and opinions
- The SAMRO Foundation Team
- The Concerts SA Advisory Panel: Gloria Bosman, Neil Comfort, Steve Gordon, Roshnie Moonsammy, and Richard Nwamba

Print information

Johannesburg: The SAMRO Foundation, 2016

Report compiled by: Gwen Ansell

Layout, design and all original graphics: Judy Seidman

Proofreading: Liz Sparg

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**“It starts with the heartbeat.
You know, tapping your foot.”**

- Modisaotsile, *Live Music Audiences interviewee*

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Tu Nokwe performing at Iketleng in Vereeniging, Gauteng, #VenueCircuit. Photo by Christine Msibi, Jozi Unsigned



PREFACE: CONCERTS SA

It starts with a heartbeat... Can you hear my heart beat? Can you feel my heart beat? Do you see my heart beat?



The rhythm of our hearts is as important to our lives and our bodies as music is to the heartbeat of our communities, villages, townships and cities. Why then do we not give the same level of attention to music as we do to the rhythm of our own hearts?

This study, *It starts with a heartbeat*, commissioned in 2016 by Concerts SA, is a direct call to policymakers,

politicians and decision-makers to acknowledge the importance of music in our country, to recognise music's inherent value - both economically and socially - and to do something about the musical heartache the country is experiencing.

We all know that music is tied to our emotions and our wellbeing. Music can make us happy, sad, anxious, relaxed, or excited. Music can soothe us and it can even induce pain. Music has been found to influence the learning ability of children. Music results in unconscious physiological responses, which contribute to negative or positive emotions. With all our understanding of the impact of music on the individual, it follows that we should produce research linking music to the heartbeat of a city. Internationally, a number of live music research studies have been produced, including the *Music Cities Report* (2015), a global study featuring our Concerts SA project.

Three years ago, the Royal Norwegian Embassy in Pretoria and Rikskonsertene (Concerts Norway), in partnership with the SAMRO Foundation, created Concerts SA with the mission to understand and encourage the growth of live music in southern Africa. The Concerts SA project started with many more questions than answers, and amongst other high impact initiatives, the project produced *Song Lines* in 2014, which built on Moshito's 2010 *Mapping of the South African Live Music Circuit*. This research found that the most crucial element of live music consumption was the audience, the consumers of music.

Where are the audiences? 2016 was the year of the Olympic Games in Brazil. Olympic competitors who had honed their bodies, skills and minds to the singular act of running or swimming the fastest, jumping the highest or throwing the furthest, strove to achieve the ultimate recognition for their years of training - an Olympic medal. This honour is well deserved, and when 'Team South Africa' returned from Rio, thousands of fans crowded the airport at their own expense to welcome their sports stars home. What had their heroes achieved? Years of discipline and training, culminating in fifteen seconds of fame on a television broadcast from a faraway country.

This research is not about sport, and does not dismiss the effort, training and achievement of excellent athletes. However, after as many hours of disciplined practice and training that culminate in live performances of more than an hour of memorable, inspiring art, musicians get far less attention than our Olympians. So, why is it so hard to encourage audiences to support live music in South Africa and elsewhere?

This research contextualises the live music sector and provides the rationale to mobilise support for small live music venues around the country and the mobility of musicians between them. With enough time, a live music circuit throughout the region could create on-going employment and heightened cultural awareness around the country. But this requires buy-in and sustained support.

Our call to the policymakers, politicians, decision-makers, researchers, artists, venue owners, audiences and all who have a vested interest in growing the music industry, is to take some time to read this research, to ponder over our suggestions and findings, use it as a toolkit or a menu and choose which options you can use to build the consumption of music for the wellbeing of our society, economically, socially and culturally.

We look forward to hearing your feedback.

Andre le Roux
Managing Director, SAMRO Foundation



FOREWORD: WITS SCHOOL OF ARTS

Music creates multiple values in our society, from the aesthetic value imparted by the musician and the well-being of the listener, to the social value for communities and the multiple cultural and economic values derived from the diverse organisational and institutional arrangements needed to host live music. These values play themselves out in villages, towns, cities and townships, wherever live music is played.

This seminal research, produced by the Cultural Policy and Management Division at the Wits School of Arts in association with SAMRO and Concerts SA, highlights the shifting terrain of this sector, and its significance both to musicians and our society as a whole. We especially acknowledge our student, Elizabeth O'Connor for her Master's research into small live music venues and contribution to this study.

This research is about the audiences for live music; who participates in live music, why do they participate, where the venues are, what styles of music can be heard and how we can support our live music circuit by engaging our audiences more meaningfully.

The results of this research are important to musicians, venue owners, promoters and producers, as well as the technical crews delivering a quality sound. It is also important to students and academics interested in the business of music, and to the trends in the music sector, arts management and cultural policy.

It is important for decision-makers, politicians and policymakers to ensure that live music flourishes, to support musicians and venues, and to feed the soul of the nation.

We are proud to be associated with SAMRO and Concerts SA and see this as a first in many more collaborative research partnerships.

Avril Joffe
Head of Division, Cultural Policy and Management, Wits School of Arts.



FOREWORD: NORWEGIAN AMBASSADOR

Music is one of the most varied, creative and powerful expressions of human culture. It is a universal language, transcending linguistic and cultural barriers, speaking directly to our hearts, bypassing the brain. Music is a place of refuge from hardship and misery; it inspires defiance, action and activism; it cannot be chained, controlled or suppressed. South African history is a testament to the importance of music as a standard and rallying point for liberation struggles and social movements, but also to how music has the power to bring communities together – in church, in the village, as a nation.

As Norwegian Ambassador to South Africa, I am proud of what the South African Music Rights Organisation, SAMRO, the Norwegian live music organisation, Rikskonsertene, and the Norwegian Embassy together have achieved in the three short years since the inception of the Concerts SA project. Concerts SA's model for making quality

live music accessible to ever more South Africans, while at the same time contributing to the livelihood of South African musicians and the economic sustainability of the country's live music venues is nothing short of inspiring. I can only hope that those who read this research paper will see the value of what has so far been achieved, and be inspired to contribute in their own way to growing and developing the music industry in South Africa.

Trine Skymo
Ambassador of Norway to South Africa



WHAT IS CONCERTS SA?

Our starting points

Concerts SA (CSA) is a joint South African/Norwegian live music development project housed within the SAMRO Foundation. CSA receives financial, administrative and technical support from the Norwegian Ministry of Foreign Affairs, SAMRO, the SAMRO Foundation and Concerts Norway. Working with musicians, promoters, venue owners and audiences, and providing support to the sector through research and skills development for music professionals, the project aims to build a vibrant and viable live music circuit in southern Africa. We also aim to develop a love for and appreciation of live music by showcasing music performances and conducting workshops at schools, with a growing presence in the basic education environment.

Since we started in 2013, we have maintained that live music could play a far greater role not only in South African culture but also in the economy. This needs urgent intervention, premised on grounded South African (and cutting-edge international) research. We work with venues, promoters and artists to foster a viable live music circuit through developing regular, sustainable performance platforms.

One early starting point has been our research mapping the national live music circuit (documented in our 2014 publication, *Song Lines*, at http://www.concertssa.co.za/wp-content/uploads/2015/03/song_lines_report.pdf). The partners identified programmes to strengthen that circuit as an optimal axis for intervention.

Our approach and achievements

We have evolved a unique model of delivering “cultural micro-grants” to support our strategic objectives. Quantitatively and qualitatively, our beneficiary reach surpasses that of major non-profit and governmental arts funders in South Africa. In 2014, our first full operational year, the project had its hand in a remarkable 335 concerts – close to one gig daily throughout the

year. During 2015, support and facilitation grew to 593 shows, delivering live music to over 70 000 individuals, with close to 1 000 musicians participating.

From the start, CSA has positioned itself as a capacity builder, stimulating and energising live music circuits through partnerships with sector stakeholders. Our primary vehicles have been the CSA’s School Circuit Programme, the Venue Circuit Programme and, more recently, the Music Mobility Fund. Concurrently, CSA drives research initiatives focused on live music performance in areas including:

- sharing research findings as a public resource;
- framing and using team development in our own programme;
- engaging in arts-related policy issues; and
- employing research findings as a public advocacy tool.

CSA has achieved brand recognition among a range of stakeholders, partners and friends: music sector role-players; local and regional cultural development agencies and arts organisations; and, increasingly, school educators and learners.

Our programme decision-making is evidence-based and informed by monitoring, measurement and research. We employ reference groups, ongoing reviews, surveys and other tools, as well as collaborating with university researchers. In response to feedback from all these we regularly modify and update our offerings. This ensures that CSA is and remains the leading driver in the field, shaping and growing live music circuits that did not exist three years ago.

For more information, visit <http://concertssa.co.za>, follow @ConcertsSA on Twitter (<http://twitter.com/ConcertsSA>) or like Concerts SA on Facebook (www.facebook.com/ConcertsSA).





Pops Mohamed at Straight No Chaser, Cape Town, #VenueCircuit. Photo by Gregory Franz

"IT STARTS WITH A HEARTBEAT"

Crafting a model for live music support in southern Africa

Summary

Research perspectives on live music (nationally and internationally) have broadened over the past decade. That was reflected in our report *Song Lines* in 2014. The volume of data, including data from the developing world, supporting new findings and practices has increased significantly since then, and has informed this current document. Importantly for South Africa, we are now responding proactively to the insight that in the new landscape of the music sector, an understanding of demand-driven planning is vital. In this light, this paper reports on the CSA-supported 2014/15 research into *Live Music Audiences* conducted by Elizabeth O'Connor at the University of the Witwatersrand. Part III of this report is led by the findings of O'Connor and others, and their implications for audience development, and particularly for the ways younger audiences can be grown.

Contextualising these recommendations, the **Introduction** to this report surveys the changing focus of the worldwide live music research landscape: the shift from exclusively revenue-based analyses towards those also focusing on place, access and experience, as well as the growing emphasis on non-conventional live music venues and previously "invisible" music activities – all of which have particular relevance for a South African live music economy, where small, medium and micro-economic enterprises (SMMEs) dominate.

Part I summarises the benefits of supporting live music for individuals, communities and the economy. A live music-rich environment can enhance competitiveness and locational advantage and grow employment and revenue, as well as offer benefits in terms of social cohesion and individual wellbeing.

Part II discusses why the next 5-10 years is a period when enhanced investment in live music could have a particularly strong impact in South Africa, and who the most effective role-players in that investment could be. The digital transformation of the industry has progressed to the point where interventions in live music can support needed transformative change. National and local government play a far larger role in live music activities than in other aspects of the music sector value-chain; corporates can reap significant benefits from a rich cultural environment; and the new growth potential for the revenue of appropriately supported cultural brokers, such as venue owners, offers pathways to viability.

Finally, **Part III** details the options through which regulation, promotion, skills development and the creation of innovative institutions can foster authentically local, sustainable live music hubs that both attract young people as music consumers and support them as music creators.



Live music is the *highest-earning activity* on the music sector value-chain.

We know more than we used to about how the sector works in Africa – but still not enough!

We can learn more about thinking about live music events as *unique experiences*, happening in *specific places*, at *specific times*, within a *big, open, interconnected* music sector. That sector has *multiple modes of operation*, and *multiple (often non-hierarchical) connections*, inside and outside the creative industries.

All this adds up to the live music ecosystem.



Sibusile Xaba's Unlearning Ensemble at Waterford Kamhlaba, Mbabane, Swaziland, #MobilityFund. Photo by Reatile Molausi



INTRODUCTION: NEW WAYS OF STUDYING LIVE MUSIC

Business and scholarly perspectives on live music as part of the music sector have changed significantly in the past decade.

This has partly been a response to the dramatic shift in the music sector value-chain, which was detailed in our 2014 publication, *Song Lines*, and will not be repeated in detail here. But, to summarise, live music is now one of the highest earners on the value-chain, along with digital music and the various associated revenue streams that can be leveraged from both of these.

As a consequence, research on both the digital and live dimensions of the music scene has begun to increase. However, as late as 2011, Netherlands researchers Erik Hitters and Miriam van de Kamp declared regretfully that in the Benelux region, “What happens in the live scene is hardly researched ... Now they have become more significant, it is time to investigate the organisational practices, logics and ways decisions are made in [publishing, licensing and performance]” (Hitters & van de Kamp, 2011: 222-223).

Africa was in a similar position to the Benelux region until very recently. However, this is now changing, with case studies of African practice incorporated into the UNCTAD Creative Economy Reports (UNCTAD, 2013), and UNCTAD studies of live music forming part of creative industry country surveys of Zambia and Mozambique (UNCTAD, 2011 and 2011a). For South Africa in particular, the research landscape has been slightly less impoverished, with intermittent national and provincial studies during the past 20 years, and a regular series of industry surveys published by PricewaterhouseCoopers (PwC, 2015) – albeit from a predominantly revenue-led perspective – as well as the Moshito/MMINO (2010) and CSA (2013) venue research projects that were consolidated into *Song Lines* (Ansell & Barnard, 2013).

Now CSA has paralleled best current international practice by shifting its research focus from the venues and events whose data dominated *Song Lines*, towards a more 360-degree exploration,

adding audience behaviour and preferences to the picture. The 2015 study, *Live Music Audiences: A Case Study of Small Live Music Venue Audiences in Gauteng*, was conducted by University of the Witwatersrand postgraduate arts management scholar Elizabeth O'Connor, in collaboration with CSA. Relevant findings from *Live Music Audiences* lead Part III of this report, informing the strategic options outlined for the effective support of live music in South Africa and the southern African region more broadly.

The shift in focus from supply-led towards demand-led research (and subsequent policy-making) is only one of the new perspectives that researchers worldwide are employing to scope live music. New frameworks and new terms are becoming current. Since these relate closely to the options we will discuss in Part III of this report, they will be briefly introduced below.

From bounded to open industry definitions

Conventionally, the music industry has been defined by its value-chain, with industry definitions at their broadest comprising all the enterprise types along the chain, and at their narrowest limited to enterprises concerned with copyright. Industry analysis has often been “limited to the relation between the live and recorded music industries” (Frith et al, 2010:2). However, particularly in relation to live music, far more flexible definitions are possible. In Chapter 4 of *Song Lines* we had already pointed to the multiplicity of live performance models that existed, and these have increasingly interested researchers. Ruth Finnegan’s pioneering work on “invisible” musicians, and the diverse pathways and contexts bringing together those formally defined as “amateurs” and “professionals” in the UK (Finnegan, 2013) resonates strongly with the way the sector operates in South Africa. Martin Williamson asserts that there is not one music sector, but many industries (Frith et al, 2016), while Simon Frith (ibid) identifies three parallel industry “worlds”: mainstream pop and rock, the underground/illegal scenes, and the world of specialised music niches and



genres. These worlds are separated by somewhat permeable barriers – it is possible for an act to move between them – but there are differences in their goals and business models, and thus in potential support strategies. Acknowledgement of the significance of the smaller specialised scenes is offered by the most recent UK live music survey (UK Music, 2016:14), *Wish You Were Here*, which for the first time incorporates data about grassroots music venues. These shifting, broadening research parameters are likely to provide more global data relevant to the South African context, where SMME venues dominate. They will also enhance the opportunities for South African music sector researchers to contribute to the global debate.

From cultural type to cultural place

As we noted in *Song Lines*, the Moshito/MMINO research initiatives in 2010 (and to a lesser extent, CSA's in 2013) were constrained by rigid data categories that focused on permanent, dedicated venue types and excluded performance types that were outside this focus (such as student and corporate gigs). Researchers elsewhere have encountered similar constraints, and are now suggesting (as, for example, UNCTAD, 2013:51) that an area focus – on the place or places where live music happens – rather than a micro-focus on individual events or venues, might yield valuable insights. Scholars are now adapting and combining spatial concepts developed for business in general, such as Michael Porter's clustering (Porter, 1998), to shape ideas about location specifically tailored for the needs of the music and entertainment industries. This is very important for South Africa, where support for live music often needs to be seen in the context of other, place-related goals such as development and community cohesion.

From the music economy to the night economy

There are temporal as well as spatial considerations here. Most live music happens at night, and sometimes entire districts are transformed after dark as entertainment takes over from administrative and retail business activities. Live music is part of this transformation, but not the whole of it; there is also a great deal of satellite spending on everything from food to security to transport associated with live entertainment (University of Tasmania, 2014:35). Because this spending

and the businesses that benefit from it often follow distinctive models and require nuanced legislative approaches, the term “night-time economy” has become current, and targeted research has been devoted to discovering what makes it tick (see, for example, Brabazon & Mallinder, 2011; Australian National...Committee, 2014). This has led, in turn, to the proposal and implementation of innovative institutions, such as “night mayors” (CityLab, 2015; Henley, 2016) designed to build the economic viability of the night-time economy. South African cities are already experiencing tensions between the demands of regulation (over for example the licensing of alcohol sales in township venues) and of entertainment-linked area development. Frameworks and institutions developed from a night-time economy perspective may suggest options for resolving such tensions.

From revenue to experience

Even PricewaterhouseCoopers (PwC, 2015), whose focus is on revenue, have pointed to the limitations of formal revenue-based analysis of the live music sector. Data derived from ticket sales and sponsorships cannot report the more informal income flows around multiple ‘club doors’, or estimate accurately what proportion of those flows accrues where. The Moshito/MMINO 2010 and CSA 2013 surveys had to rely on revenue estimates from role-players, such as musicians and venue owners, with the accompanying weaknesses that always taint self-defined and self-reported data. Such data remain relevant, but they cannot – alone – paint an accurate picture of industry benefits. This is particularly so because many of the ‘selling points’ of live music are more intangible: they relate to the non-replicable nature of any live music event and to the ways it can also contribute to social and knowledge capital. Thus scholars are increasingly discussing live music as part of the “experience economy” (Pine & Gilmore, 1998), in which aesthetics, sociality, education (the broadening of experience) and entertainment are sources of value for both consumers and businesses (Pine & Gilmore, 1998; UNCTAD, 2013). A purchaser of experience buys something that is memorable, uniquely personal and unfolds over time – exactly what happens at a live gig.

From digital competition to digital complementarity

Experience – particularly social experience – is something live music can offer that a digital download or stream cannot. The stereotype of



digital distribution has cast it as the dangerous enemy of performers, but an experience economy perspective makes it clear this is not automatically the case. While the digital distribution model certainly threatens the survival of some role-players such as the historically dominant record labels – whose business model rests on their ‘ownership’ of music copyrights – it does not necessarily do the same to artists. The two highest-value products in the new music industry value-chain are live music and digital product. Live performers who can escape the gatekeeping of labels, and master and control their live and digital output have the opportunity for viable income streams. This is because there is complementarity between live and digital. The live gig offers fans a unique experience; the digital product is a reinforcer for that, offering easy, almost instant, regular access to the music and its associated memories, as well as being a marketable good in its own right. However, the next live gig will be different again. Now research in Norway (Danielsen, 2016; Maaso, 2014) is developing user-centric revenue models for streaming that will be more effective in realising viable musicians’ incomes than the current pro-rata systems, while the blockchain innovation applied to payments for streamed music (Rogers, 2015) may offer another viable model.

From hierarchy to ecosystem

From the foregoing it can be seen that live music production and consumption are not simply about events, individual consumers and venues,

the profits of distinct industries, or hierarchical links in a value-chain. Rather, they are about access, experience, place, interactions between complementary enterprises, and human, spatial and temporal patterns of sociality: about musical life and culture. The term most often used to sum all this up is the “live music ecosystem”; an interrelated set of living, changing systems that are themselves part of the broader ecosystem of a community, city or region. It involves “the materiality of venues, the interdependence of otherwise disparate actors and the sustainability of the resulting live music culture” (Behr et al 2016:20). The term, however, has utility at two levels: first as a broad indicator of music sector complexity and interrelationships, and second for directing focus towards specific locations, and the material ingredients that make a live performance ‘work’ (or not) there. The first of these implies an essentially broad developmental framework, where creativity and culture find a place as both drivers and enablers of development (UNCTAD, 2013:38). Thus it is particularly useful for considering live music and its place in a country such as South Africa. The second, by contrast, has the capacity to suggest more concrete, specific policy options (for authorities, cultural brokers, and artists) in staging and supporting viable live music. Precisely because of its emphasis on the materiality of live music events, this research perspective validates creating policy space to accommodate the specifics of the South African and southern African contexts.

The Muffinz (SA) and Monica Ifejilika (Norway/Nigeria) at a school concert in Oppland, Norway 2014, #Exchange. Photo by Concerts Norway



PART I: WHY SUPPORT LIVE MUSIC?

Live music has benefits for the economy and society.

It drives revenue and contributes to GDP, brands destinations and leads tourism. It creates jobs, attracts investment and can stimulate innovation. It also builds a place's knowledge capital and social cohesion, and can even make people happier and healthier.



Ithashi Elimhlophe at Sauti za Busara 2015, Zanzibar, Tanzania, #MobilityFund. Photo by Sameer Kermalli

“Music informs identity, leaves longstanding memories, and helps create meaning across communities and cultures.”

Live music is often portrayed as a ‘light’ area. The media too often offer a shallow focus on personalities, and it is rare in South Africa to find in-depth analysis of the industry, even in business publications. The topic occupies a tiny number of South African business research dissertations. But this is not an accurate picture. Investing in live music offers multiple, diverse and significant benefits. Although we present them below under distinct headings, the cultural, social and economic aspects of music-making and its benefits are interrelated (see Sedita, 2008); they all fit within the broader rubric that live music is good for development.

How investing in live music can benefit the economy

As multiple studies have demonstrated (see

references), live music not only generates jobs and revenue, but can also be a catalyst for broader economic development. The Australian Performing Rights Association estimated that the venue-based live music sector in that country generated Aus\$1.21bn in 2010/11 (APRA, 2011:2); the University of Tasmania has demonstrated a 3:1 cost-benefit ratio from live music investment (University of Tasmania, 2014:2), including both revenue and non-revenue benefits at commercial, civic and individual levels (ibid:39). The UK Music 2015 survey, *Measuring Music* (UK Music, 2015) indicated that music sector growth outperformed the rest of the UK economy by almost 100% (5% as against 2.6%), with live music the sector demonstrating the most significant growth in gross value added, exports and employment within that calculation. The US National Endowment for the Arts (NEA,



2015) reported that the arts contributed 4.32% of GDP in that country. For South Africa, PwC has projected growth of 7.9% for live music revenue over the next five years (PwC, 2015). The various multipliers and contingent benefits described below need to be viewed in the context of these trends, which recent research (Nielsen, 2016) suggests are intensifying.

At the national level: Destination branding, tourism and exports

As many 'music cities' around the world (Austin, Texas is perhaps the most famous example; see Tretter, 2015) have demonstrated, the presence of a vibrant live music scene and distinctive live music events allow effective destination branding and can draw overseas visitors to a country. As one local example, a study conducted by North West University and the Tshwane University of Technology (Saayman & Rossouw, 2010) indicated that the Cape Town International Jazz Festival contributed more than R475m to the economy of the Western Cape and Cape Town, with domestic and foreign tourism contributing significantly to that figure; foreign visitors to the festival have risen steadily since then. Spending on, for example, national airline carriers, in-country transport and non-refundably taxed goods and services mean that such visitors bring indirect revenue to the whole country as well as direct revenue to a specific city or region. However, there are no unified indicators to make comparisons possible between different national festivals.

In addition, distinctive live music provides an export commodity for a country, through both the touring performances of live artists and the related income from DVDs, CDs, downloads or streaming, and memorabilia.

At regional and local levels: Revenue, jobs, attracting investment

Just as a live music style can brand a nation – for example, Jamaica and reggae or Brazil and samba – so it can brand a region or city. As IFPI notes (IFPI, 2016:25) “for select cities with the strongest music scenes or deep music heritages, music is a big part of who they are. Think ‘Liverpool’ and most people think ‘the Beatles’...” Although South African music is already making an impact on international stages, this is not yet being leveraged. Few people think of Grammy-winners Ladysmith Black Mambazo and immediately also think of “Ladysmith” the town,

or of BET award-winner Black Coffee and “Johannesburg”.

The contribution of live music to area branding offers opportunities not simply to attract visitors but also to leverage a distinctive locality to attract investment, offering businesses that locate there access to “unique, extra-economic advantages” (Tretter, 2015:52) such as the image of the place, the quality of life available and the linked capacity to attract or retain employees. South Africa has often sold its scenery and wildlife in this way, but has rarely done so for its cultural assets.

The economic multiplier effects described above operate at national, regional and local levels, and can even occur on a micro-scale, from the circulating spend of a local visitor who moves from Suburb A to Suburb B of the same city to enjoy live music. A recent study of the UK city of Bristol suggested that live music injected £123m into that city’s economy, as well as creating 927 full-time equivalent jobs in 2015 (Gumble, 2016).

Job-creation can be both direct and indirect. Live music offers low barriers to entry for aspiring musicians at the informal end of the industry, and the same is true of entry to employment in certain entertainment-related industries, such as catering and bar service. All these, however, can offer career paths to higher levels, a fact acknowledged by qualifications listed on the South African Qualifications Authority framework.

The taxation income from live music goes to all spheres of government, and thus can be employed for job-creation anywhere. Spending on live music itself is also both direct and indirect. As well as paying for a ticket or entry fee, live music patrons are likely to spend on a number of related goods and services: accommodation if they travel away from home; transport; fashion if the live event they attend has a dress culture; food and drink; gig memorabilia; venue memberships and music-related subscriptions; and communications, including items as small as phoning for an Uber cab or making an online booking (University of Tasmania, 2014:18; Behr et al, 2015). Finally, performing musicians themselves can also stimulate a multiplier effect by their own spending on, for example, stage attire, catering or transport (Ansell & Barnard, 2013a).



At the firm level: Productivity, market share and innovation

Cultural creativity has clear links (UNCTAD, 2013:60) to economic creativity, both direct and indirect. A conducive economic climate is built and sustained by revenue and employment flows such as those described above. In addition, the flexible, creative thinking that characterises the creative industries contributes to the knowledge capital of a nation, region or community. Thus a vibrant, well-supported live music sector can also have a positive impact on the productivity, innovativeness and market share of diverse business enterprises, which are not themselves part of that industry.

How investing in live music can benefit society

“Music,” declares the University of Tasmania (2014:6), “informs identity, leaves longstanding memories, and helps create meaning across communities and cultures.” These impacts of

the experience economy are important for all societies, but are particularly important given the fractured relational legacies that apartheid bequeathed to South Africa, and colonialism to the whole southern African region.

At the community level: Social cohesion and knowledge capital

Attending or participating in a live music event brings people together, forging friendships and relationships, often across community barriers, and providing a focal point for communities (whether defined by taste, residence or other factors) to gather. For UNCTAD (UNCTAD 2013:56) this builds relational capital, and enhances not only cultural but broader social awareness, so that it can contribute to activism or volunteerism towards a better environment or better area governance. That attendance at cultural events creates and strengthens social capital has been a very prominent finding of international surveys (see, for example, University of Tasmania: 27/8), and is often one

FIRM LEVEL BENEFITS OF LIVE MUSIC

<p>PRODUCTIVITY:</p> <ul style="list-style-type: none"> ➤ Good for the health & wellbeing of employees. ➤ UNCTAD draws links between climate of cultural creativity and broader economic creativity (innovation; problem-solving). ➤ Concentrated creativity enhances economic development more generally through the operation of an ‘intellectual multiplier’ effect. 	<p>MARKET SHARE GROWTH</p> <ul style="list-style-type: none"> ➤ Location in association with a music ‘place’ offers brand recognition & product differentiation opportunities. ➤ Music tourists & other event visitors to a place potentially grow the market for products branded in association with that place.
<p>CAPACITY</p> <ul style="list-style-type: none"> ➤ ‘Vibe’ attracts a diverse pool of work skills to the area. ➤ By attracting other businesses and entrepreneurs, opens greater opportunities for partnerships & accessibility (even integration) of inputs & outlets. ➤ The relational capital built through cultural activity can stimulate improved area governance, regeneration and infrastructure. 	<p>MARKET SHARE RETENTION</p> <ul style="list-style-type: none"> ➤ [For public interface businesses] attractive location adds ongoing value for customers over time. ➤ Ongoing opportunity to engage with clients and customers via the experience economy. ➤ Location in an innovative, cutting-edge cultural community can assist trend mapping & keeping up with market change.

of the highest values interviewees allocate for the appeal of live music. By contrast, *Live Music Audiences* (O'Connor & Concerts SA, 2015), while finding that sociality was indeed an important motivation for live music attendance in Gauteng, also uncovered significant feelings of exclusion among audiences relating to certain events and locations. This underlines the importance of better support for what could be a powerful engine of social cohesion in the South African context, and the issue will be revisited in more detail in Part III.

At the human, personal level: Participation and wellbeing

Live music activities, whether as audience or player, have a strong active component. Musicians perform; audience members may socialise or dance, discuss the music with friends or chance acquaintances, applaud aspects of the performance and, by their very presence, 'make' the atmosphere for both performers and fellow audience members. Socialising, experiencing and making music, and physical activities, such as dancing have all been demonstrated by numerous international studies to contribute positively towards health and wellbeing along dimensions as varied as fitness, immunological response, and mental health through improved self-perception and reduced isolation (University of Tasmania: 2014:27-8; Weinberg & Joseph, 2016).

How investing in live music can benefit the broader cultural landscape

Support for cultural industries has often been promoted in heavily inward-looking terms, bolstered by arguments that investing in them will raise their standards, create jobs in them, or preserve their heritage. As the foregoing shows, this is an unnecessarily narrow frame through which to view live music (or, indeed, any other cultural activity); the beneficial impacts spread much wider than the music or hospitality industries alone.

However, the benefits to culture of supporting live music are also real and important. Music does not exist in isolation: it is an element in theatre, dance, film, traditional orature and more, and is only one aspect of those geographical areas where culture and entertainments are showcased. The benefits we discuss below offer their own multiplier effects across the cultural landscape.

Legacy, creativity and innovation

South Africa has an immensely rich and varied cultural heritage, and music is an important element in this. But for centuries colonialism and then apartheid fragmented communities, distorted traditions and erased much of the record. Further, 'tradition' is not exclusively the product of the distant past. The 20th century saw the development of distinctive South African forms of jazz and township soul music among others, which were similarly negated by apartheid cultural policies. Support for live music makes resources available for players and audiences interested in recovering and innovating around these traditions, working in existing genres and creating new ones. It also facilitates the sustainability of the spaces where music old and new can be exposed. All of these activities support the less easily quantified benefits of an empowering understanding of history, identity, context and potential.

Industry and infrastructure growth

Because of the integrated role of live music in many other cultural activities and genres, and its leading role in the post-digital music sector overall, support for live music makes an important contribution to music and to the cultural industries more broadly. Infrastructural support for the locations where live music happens improves infrastructure for all the activities in that area. Better facilities in a music area attract visitors and may also attract complementary businesses, new investors and employers, and even new residents. All of these can help to mitigate seasonality, one of the negative features of the current live music business cycle.

Professionalism and talent

Support for live music validates the industry as a career path, endowing it with status and recognition. Improved resources and more frequent performance opportunities draw in talent and facilitate expanded experience and the development of greater skill and professionalism among working musicians (UK Music, 2015). This, in turn, makes performances more attractive to audiences, live music-related products more saleable and exportable, and revenue streams more robust. Which takes us back to the benefits to the economy: the place where this section started...



PART II: RIGHT TIME; RIGHT ROLE-PLAYERS



Now is the right time to support live music.

The industry in South Africa has developed to the point where intervention can make a real difference.

Live music is now a more important revenue-earner than recorded music. Venues and music organisers are playing a much bigger role in industry growth.

Government – especially local government – and big business can offer crucial help. Government plays a key role in live music through regulation and facilitation. Big business has resources and – just as important! – skills that can energise a largely SMME sector and redress the damage done to live music by apartheid.

McCoy Mrubata & Wendy Oldfield at the Bassline, Newtown, Johannesburg, #MobilityFund. Photo courtesy of the artists

The time for live music support is now

In the years before and between the two World Wars of the 20th Century, live music dominated the music sector, with sheet music the main copyright product, but cylinder recordings and later 78rpm phonograph record sales on the rise. After 1945, gramophone records (LPs and singles) became the dominant product, later joined and gradually displaced by reel tapes and then 8-tracks, cassette tapes, and CDs. But all of these were changes in recording media, which did not challenge a business model based on the 'ownership' of music, although tapes and CDs facilitated on-the-move access.

The most important disruptive technology in the music sector – music accessible for digital download or streaming via the internet – is only

20 years old. The file extension suffix .mp3 was established in 1995; software for downloading first became widely available in 1996/7.

But since then, as industry analysts have noted, a revolution has occurred in the music industry value-chain. CDs are now a low-value item (although there has been a resurgence in vinyl records as a niche product). Many analysts and prominent industry players (for example, Kanye West) have already declared music stored in physical formats for ownership by individual consumers officially 'dead' (see Blakemore, 2015). In the past year or so, streaming has begun to overtake downloading, just as downloads overtook physical product sales (Perez, 2016). Live music has returned to the top of the value chain in terms of both revenue and cultural value (Behr et al, 2015).



South Africa is exhibiting exactly the same trends, though with various time-lags. Spending on music in digital formats is projected to overtake spending on physical formats in 2019; downloads for ownership peaked in 2015, as SA music consumers gradually began the switch to access models (streaming). Live music overtook recorded music as a source of revenue in 2014 (PwC, 2015: 213-20).

Additionally, the growth of live music also extends the role of, and thus revenue available to, various kinds of cultural brokers, including venue owners and event organisers (UNCTAD, 2013:90). For this reason, there is improved potential at this point for appropriately supported venues and organisers to move towards financial viability.

Thus the time is ripe now to make interventions to support and sustain South African live music. Music sector transformation in South Africa is at the point where such interventions can make a dramatic and positive difference.

Government and business are key role-players

Everybody should support live music. Given the benefits – economic, social and cultural – that live music can bring, areas and enterprises should create homes for it, media should publicise it, audiences should attend it, and agencies at every level should make resources available for it. All of that is valid and important, but it is an extremely broad and imprecise agenda. In this section, we focus more precisely on the sources of some specific support and facilitation activities that have had demonstrable impact elsewhere; in Part III, we outline options for practical action from both these and a broader range of other potential role-players.

“When you actually listen to people live...it’s quite special to have that connection with them. It’s very different...”

- Ntombenhle (O’Connor and Concerts SA 2015:26)

Government

Both national and local government play a far more significant role in live music than in other aspects of the music sector, especially in comparison to their role in the creation of recorded product (Brennan, in Frith et al, 2010). The IFPI report *The Mastering of a Music City* (IFPI, 2016: 17) identifies “multi-level government support for music” as a key element. The role of government has regulatory, facilitative and promotional aspects, as shown below.

As Frith et al (2016) have noted, one important musical ‘world’ is always the world of underground, unregulated (and sometimes illegal) music activity. The reasons why such an important unregulated sector exists are context-dependent. In almost all contexts, the small-scale, cash-economy nature of independent music activities is a factor. In some places, the perceived association of late nights and music with socially disapproved or illegal satellite activities such as sex work and the use of drugs affects official policies.

These areas are the domains of both national and local government, but many researchers have suggested that local implementation is the most important determinant of success.

HOW GOVERNMENT IMPACTS ON LIVE MUSIC

Aspect	Activities
Regulatory	Laws, regulations and licensing (alcohol; zoning; parking; postering; noise; facilities; health & safety)
Promotional	Investment, grants and subsidies; arts & cultural policies; tourism policies & promotion; youth & education policies, including arts in schools (IFPI, 2016); broadcasting & local content policies
Facilitative	SMME support; transport /access policies (Behr et al, 2015); area security/policing; area and building planning; housing policies; research





Ildo Nandja at Amatikulu Primary School, KwaZulu-Natal, #School-Circuit. Photo by Vulane Mthembu

In South Africa, the long, disgraceful history of policing or banning black sociality (prohibition; illegal gatherings laws) has undoubtedly contributed to a complex, sometimes burdensome legacy regulation regime as well as to the aversion of some community music practitioners to registration. Whatever the reasons, the situation creates a substantial but currently un-tappable pool of potential revenue that could, given a different management approach, contribute to the fiscus.

Businesses inside and outside the arts

Sponsorship of the arts in South Africa from non-arts businesses has more than doubled in the past ten years (albeit from an extremely small base) to just over half a billion rands: a drop in the ocean compared to South African sports sponsorship spending. However, 54% of respondents surveyed by Business and Arts South Africa in 2015 believed that sponsorships offering an alternative to sport are becoming more important (BASA,

2016). For business sponsors, music is the most strongly and consistently supported artform. In addition to the competitive advantages outlined in Part I of this report, businesses are recognising that music offers an opportunity for their brands to attract new, or engage with existing, customers via experiential platforms (ibid) and are employing branded sponsorships of events or artists to leverage this. However, sponsored live events are only one (limited) example of the range of supports that business can offer to live music.

Because they have insider knowledge, businesses within the music sector can be some of the best managers of their own practice. As one example, the Australian state of Victoria supports a “Thriving Music Venues Forum” to monitor and discuss issues relevant to live performance, including regulation, and to develop and implement codes and standards of best practice (State Government of Victoria et al, 2010).

ASPECTS OF BUSINESS INVOLVEMENT WITH LIVE MUSIC

<p>Spatial support</p>	<p>Company spaces, from auditoria to parking lots to undeveloped sites can become spaces where live music happens, either regularly or as a temporary expansion of scale during, for example, a city festival.</p> <p>Companies can also take the interests of live music and existing or potential entertainment areas into account when making spatial development decisions.</p>
<p>Corporate Social Responsibility (CSR) programmes</p>	<p>A range of live music-related activities can qualify as CSR, from music education or the donation of instruments to subsidising visits to live music events for disadvantaged groups or communities.</p>
<p>Investment decisions</p>	<p>Staying up to date about the transformed nature of the music sector and its value-chain, and awareness of the ‘creative map’ of a location can help to target investment appropriately.</p>
<p>Skills transfer</p>	<p>Mentorships of artists, venues or event organisers can diffuse the business skills of successful enterprises into music-related SMMEs.</p>
<p>Opinion-shaping</p>	<p>Lobbying for live music-friendly legislation and policies; participation in coalitions and forums with music role-players; endorsing fundraising and forming funding consortia with peers can all leverage the influence of business to the benefit of live music.</p>



PART III: STRATEGIES AND OPTIONS FOR LIVE MUSIC SUPPORT

Audiences are attracted to live music by hospitable, efficient venues and unique good music they can connect with.

Audiences are deterred by erratic programming, poor information, unfriendly spaces – and most of all by access factors such as transport and affordability.

To co-create genuine African music cities we need **integrated planning to support better venues**. Institutions and regulations need to be more relevant and flexible to plan, promote and resource live music better.

This feeds into and combines with **broader social change to promote equality & cohesion**.

What we learn from these measures can help us spread the benefits. We can scale up the numbers of events, quality, opportunities and access, extending them to some areas that aren't urban.



Thobeka Langa at Sansikane Primary, Cato Ridge, KwaZulu-Natal, #SchoolCircuit. Photo by Vulane Mthembu



WHY DO SA AUDIENCES ATTEND LIVE MUSIC – AND WHY DO THEY STAY AWAY?

Findings from the CSA “Live Music Audiences” 2015 research	
Audience attractions	Audience deterrents
Opportunities for social interaction	Financial factors: price of tickets and lack of disposable income
Emotional self-actualisation	Shortage of events
Seeing talented musicians perform	Lack of public (affordable) transport
Sense of connection with artists	Spatial/locational issues that are legacies of apartheid
Knowledge of artist or genre	Fears about personal safety
Venue that is hospitable, spatially free (not enclosed), and familiar	Sense of exclusion: event is “not for me”
Uniqueness of music offering	Lack of consistent programming
Legacy factors relating to place or music	Lack of consistent, effective promotion

NOTES: Research findings here are based on data from interviews and observation, conducted by Elizabeth O’Connor, and on broader research including an online survey conducted by CSA. For brevity, the two sets of responses are referenced throughout as ‘the CSA research’ or ‘Live Music Audiences.’ Other deterrents mentioned briefly in the research include: poor sound quality and competition from free government-sponsored music events.

International comparison: The common ground

In many important respects, South African audiences – and especially younger audiences – have a great deal in common with their international peers.

Social interaction has a high value as part of the live music experience everywhere. In the US, the recent National Endowment for the Arts survey (NEA, 2015) – which included live music as part of a broader definition of arts consumption – found that three-quarters of attendees selected “to socialise” as their motivation for attendance. Behr et al’s (2016) case studies of several individual and very different UK live music venues reported multiple positive comments relating to crowd and “who you sit with.” The East Midlands Jazz study (Maitland, 2010), which focused specifically on young audiences, found that the social experience of attending live music was rated most highly. This is not surprising: Maitland, like the CSA survey, noted that younger listeners are emotional, rather than analytical responders to music experiences who value opportunities for interaction with musicians.

**“I hate going to live events
[when] the sound just sucks.”**

*- Nomsa, Live Music Audiences
(O’Connor and Concerts SA, 2015:30)*

Behr et al’s (ibid) case studies provide extensive reinforcement for the importance of the specific characteristics of venues and the music on offer: hospitable vibe; good sound (also mentioned, albeit not as a high priority, in the CSA survey); and effective organisation. Behr also found that being a “stable, long-lasting” venue was a plus for building audience. The NEA (ibid) reported that the opportunity “to experience high-quality art” motivated two-thirds of ticket-buyers; this chimes with CSA’s findings concerning talented musicians and unique musical offerings.

In terms of deterrents, issues of access, transport availability and cost provided more common ground – despite the very different socio-economic and urban contexts of different surveys. Lack of disposable income deterred 38% of NEA respondents; lack of transport 37%. Behr et al (2015; 2016) note the recurring importance of transport access to the viability of events and venues. The University of Tasmania also (2014:31), found access, including “poor public transport options”, a major deterrent for the music consumers it surveyed.

Ineffective promotion was also as much of a concern for East Midlands Jazz’s young respondents (Maitland, 2010) as for CSA’s. Maitland’s respondents specifically criticised over-wordy promotional material that was not accessible in the places they visited or via the platforms they used; CSA’s respondents cited a tendency to publicise events at the last minute, as well as infrequent online information postings.



International comparison – the differences

Despite all this significant common ground, it would be surprising if South Africa's distinctive history had not also scarred its live music scene.

Although both the young people consulted for the East Midlands Jazz research and those interviewed by O'Connor for CSA cited a sense of exclusion as an important deterrent to attending live music events, the context is very different. The UK youngsters had little knowledge of jazz music, felt intimidated by (often much older) genre aficionados at jazz events, and felt alienated by audience codes of behaviour.

The young South African audience members surveyed often indicated good genre knowledge, including about jazz, which has historically been part of popular music culture in this country. Their sense of alienation derives more from the racial, spatial and locational legacies of apartheid, as well as from South African society's persisting economic inequalities. Those faultlines often coincide – for example, in the dominance of cost factors as a deterrent for black respondents, and its invisibility among white respondents in the CSA research. Transport access, too, has a racial/spatial dimension for black respondents: it can take close to an hour to travel between the historic black township of Soweto and the Johannesburg city centre where many music venues are situated, and public transport between those points (in fact, mainly privately-owned minibus taxis) stops running shortly after 8pm, the time when most live music is just starting. These factors also contribute to concerns about personal safety, especially for women.

Most of these concerns are not significant barriers for more affluent black audience members (what one CSA research respondent called “the Black premium people”), although safety and security, and the persisting residential/spatial separations concern everyone.

For younger and less monied respondents, “race” is less of a factor in Johannesburg, although some respondents indicated they perceived it as a problem in other places, specifically singling out Cape Town and Pretoria. Owners of city-centre venues described seeking and seeing diverse audiences; those in township or low-income suburban areas spoke of wanting to attract diverse audiences, but seeing primarily community attendance – spatial and transport legacies work in both directions.

“You can't really break the social barriers...that fear and the discomfort would be a barrier.”

- Nzolo, *Live Music Audiences*
(O'Connor and *Concerts SA*, 2015:42)

But other – invisible – barriers also exist. Apartheid restrictions destroyed live music in many townships. In the past, certain metropolitan places and spaces would have excluded black people explicitly, under apartheid legislation. Today, very similarly located venues are perceived as excluding younger respondents implicitly, through both cost and elitist attitudes. The CSA research cites such observations as “Even if you're coming in to appreciate the music, they want to sell that expensive bottle”; “I don't like places in the North [the formerly segregated, affluent Northern suburbs of Johannesburg], they're fake.” “I like going ...without feeling like I'm underdressed.” Overwhelmingly what O'Connor's responses suggest is that for her sample, while certain material legacies of apartheid persist, class is beginning to over-determine race.

These attractions and deterrents are all interconnected within the music ecosystem: a measure to address one is likely to impact on others too. But what the CSA research confirms is that South Africa already has many of the ingredients that comprise the ecosystem. IFPI (2016), in its 22-city study of what makes a “music city”, defined those ingredients as follows:

- A community of artists and musicians
- A thriving music scene
- Venues and spaces for music
- An audience that is interested and eager
- The presence of other music-related businesses.

All these ingredients already exist (though with differing levels of success and development) in South Africa. Some tourism-focused cities already have thriving night economies and so does Johannesburg, despite tourism not being its main focus (Ho, 2016). So how can support structures be improved and connections enhanced to enable them to realise their full potential?



Policy aims

To strengthen the attractions of live music venues and events, and mitigate the deterrents, policy measures are required that:

Objective A: Support the capacity of an increased number of venues with better geographical distribution to present consistent, quality (in both production skills and hardware) music in hospitable environments. This will involve creating policies friendly to music, musicians, venues and audiences.

Objective B: Support the capacity of venues to manage, promote and publicise their activities. This will involve links to audiences on multiple platforms, including potential tourist audiences.

Objective C: Reinforce broad understanding and appreciation for music, artists and genres. Today's schoolchild playing a recorder is tomorrow's fan – or player.

Objective D: Enhance the affordability of events.

Objective E: Improve transport access and area security.

Objective F: Deal more effectively with inequality and social fragmentation.

Some of these objectives – particularly the last – are not achievable through isolated improvements in live music policy alone. They are, rather, a function of broader socio-economic policy and the context for the arts it creates. Yet we know the shared experience of participating in live music does contribute to social cohesion, and insofar as live music is an economic driver, a more effective and viable industry can create more jobs, improved revenue and better fiscal resources for social change.

Regulatory options for supporting live music

Because both national and local regulation has such a significant impact on live music activities, regulatory change is an obvious point of intervention to create music, musician and venue-friendly environments. University of Tasmania research (2014:32) found that across Australia restrictive regulation and the “costs associated with compliance” were a significant barrier to venue operation. Though these areas are the domains of both national and local government, UNCTAD suggests (2013:87) that “municipal policymaking on the creative industries is often more effective in creating results than national

HOW REGULATION CAN SUPPORT POLICY OBJECTIVES

Regulatory area	Intervention and improvement options
Area zoning	<p>Create improved consultation mechanisms on zoning decisions, including all role-players. (Objective A)</p> <p>Monitor the impact of changing property prices and rates on live music. In particular ensure that rising rents, commercial re-development and gentrification do not erode the character and viability of entertainment districts. (Objective A)</p> <p>Aim for better spread of live music venues to redress destruction under apartheid. (Objectives A & E)</p> <p>Protect legacy venues if areas are re-zoned. (Objective A)</p>
Alcohol licensing	<p>Recognise explicitly the principle of balancing community standards and income-generation/live music access. (Objectives A & E)</p> <p>Improve consultation mechanisms to ensure representation for all arguments. (Objective F)</p> <p>Create transparent, accessible processes that allow no room for corruption. (Objective F)</p> <p>Create more flexible definitions and requirements to accommodate SMME operators (vital to spread venues into live music-starved areas). (Objectives A, E and F)</p> <p>Ensure speedy response time for licensing requests concerning once-off events (Objective A)</p>
Parking	<p>Make parking provision for night-time as well as daytime needs a planning consideration. (Objectives A & E)</p> <p>Improve night-time public transport to reduce parking needs, assist night workers and link unequally-provisioned areas. (Objectives A, E & F)</p>

Postering	<p>Help SMME operators understand and access other publicity platforms (e.g. online; broadcast) to mitigate area untidiness while improving event publicity. (Objectives A & B)</p> <p>Make poster permission processes simpler and faster. (Objectives A & B)</p>
Noise & littering	<p>Employ 'Agent of Change' principle. A venue moving into a residential area is responsible for managing the change – but the responsibility for change also falls on a property developer building new residential or office units in an established entertainment area. (Objective A)</p> <p>Improved consultation mechanisms. (Objective A)</p> <p>Clearly and equitably demarcate responsibility for area clean-up. (Objective A)</p>
Venue facilities/ standards and health & safety	<p>Ensure flexibility and support to accommodate SMME venue operators via realistic standards, ongoing opportunities for owner training and support for facility upgrades.</p> <p>Recognise employee organisations and enforce worker H&S provisions.</p> <p>Incentivise employee access to relevant NQF-accredited training to raise standards</p> <p>(All: Objectives A, E & F)</p>
Freedom of movement	<p>Recognise that cultural brokers (music organisers) and artists operate in a commercial environment with special needs (volatile, trans-national). (Objective A)</p> <p>Facilitate speedy, flexible, transparent provision of industry-related visas. (Objective A)</p>
Finance	<p>Stop taxing imported musical instruments and some music equipment as luxury goods; they are 'tools of the trade' for economic development. (Objectives A & F)</p> <p>Recognise the 'special characteristics' (project-based; short-term) of the creative industries and create regulatory & reporting mechanisms and requirements that can accommodate and support these, including 'Plain Language' information. (Objectives A & F)</p> <p>Familiarise fiscal and regulatory authorities with bitcoin/blockchain transactions and develop regimes that can accommodate these. (Objective A)</p>

strategies." Behr et al underlines this: "a key issue in terms of whether a music scene thrives is the way in which [nation] wide concerns are treated and legislation implemented at local level (Behr et al, 2015:4).

These measures – creating the framework within which a thriving live music scene can function legally – are at least as important as (and may be even more important than) financial support from local or national authorities.

The starting point, suggests UNCTAD (2013), is with some form of cultural mapping. The organisation suggests four sets of important questions that local authorities need to ask themselves:

Questions about the current situation: What resources and capacity exist to support cultural initiatives?

Questions about potential: What strengths and assets exist within the current cultural environment and what opportunities do these offer?

Questions about gaps: What gaps exist in capacity, and what gaps exist in the local economy and society, where cultural industry development could assist?

Questions about monitoring and evaluation:

What indicators and benchmarks will be appropriate for evaluating cultural industry development, and what process will work best for implementing these?

UNCTAD (2013) cites the 2008 Gauteng Cultural Mapping initiative as providing some indications of where the needs for support were concentrated. However, that initiative is now eight years old and has not been repeated in the intervening years. Further, many South African cities have never conducted such investigations.

Effective consultation, accessible information, good communication and transparent processes are the cornerstones of appropriate policy – seeking clarification rather than making arbitrary decisions on licensing is one obvious example. But it is clear from multiple international case studies (Frith et al, 2016; Behr et al, 2015 & 2016; UNCTAD, 2013) that regulatory problems often arise not from negative attitudes, but from inappropriate responses because regulators simply lack information about how live music works. Enhanced individual skills and knowledge among regulators could fix some of this. But, as we discuss below, new, more appropriate institutions may also be needed. (See Directions for future research, on page 30.)



INSTITUTIONAL OPTIONS FOR SUPPORTING LIVE MUSIC

Institutional area	Intervention and improvement options
Management of night-time economy	<p>Acknowledge the existence and needs of a distinctive night-time economy. (Objective A)</p> <p>Establish a night cultural officer or Night Mayor. (Objectives A, B & E)</p> <p>Establish and support effective music or entertainment advisory boards, venue owners' forums or similar. (Objectives A, B & E)</p>
Silo operation of role-players	<p>Establish integrated planning mechanisms within public authorities.</p> <p>Establish integrated planning mechanisms that break silos to include public and private role-players and industry entities at all levels.</p> <p>(Both: Objectives A, B, C, D, E & F)</p>

The existence of the night-time economy is not, of itself, a 'problem' that must be regulated out of existence.

Managing the night-time economy

The night-time economy, in which most live music takes place, has a distinctive identity and different characteristics from the daytime economy that regulators must spend most of their time on. It is characterised by a proliferation of small enterprises: many short-lived; some core to live music (such as jazz clubs); some meeting satellite needs (such as restaurants and bars); some combining activities to which they allocate different priorities (such as a restaurant offering live music, or a music club selling meals to patrons); some offering opportunities for excess and misbehaviour; and some simply open in the same areas and with the same late hours (such as gyms or internet cafes).

In the night-time economy, work and leisure overlap. While entertainment and live performance 'lead' the sector, it also involves large numbers of workers not defined as creative – bar staff, cleaners, taxi-drivers and more – often in low-wage, casualised jobs, making a significant contribution to the economy, and with problems (such as travelling home at unsocial, unsafe hours) that need to be acknowledged, understood and solved.

All of this poses a complex, interrelated set of policy questions requiring not only specialist knowledge, but also an attitudinal shift. The night-time economy creates jobs and contributes to both culture and national revenue. The value of the London night-time economy, for example, has been estimated at £66bn (Henley, 2016). The

problems sometimes associated with nocturnal economic activity – drink-fuelled aggression, littering, inappropriate parking and more – can and should be managed: their occurrence is not automatic. As the University of Tasmania points out, "a growing body of research suggests there is no empirical evidence that identifies live music as a cause of such behaviour" (University of Tasmania, 2014:12).

For this reason, many cities around the world are developing specialised institutions shaped for the task: music officers, entertainment or music advisory boards, venue owners' forums, night cultural officers and – in Amsterdam, Toulouse, Zurich, Paris and a growing number of other cities worldwide – 'Night Mayors'.

The value of a 'Night Mayor'

The first World Summit of Night Mayors was held in April 2016. Amsterdam's Night Mayor post, the pioneer, was established after more than a decade of research and experiment, via the establishment of a small NGO with strong, mandated powers of recommendation, jointly funded by the city administration and the (not only night-time) business community. The current post-holder, Mirik Milan, argues that the 'normal' response of city authorities to night-time problems is "bring in a curfew, tighten regulations, shut places down, ban stuff. It's understandable: how can you make good laws if you're in city hall, with no real clue of what's happening out there in the night-time? The only way is for the night economy, city hall and residents to figure out, together, how to make it work" (Henley, 2016).

Milan's Amsterdam recommendations – many of which have been effectively implemented – range from more flexible opening and closing hours (which prevent big crowds being ejected

from all the clubs in an area simultaneously) and policy support for out-of-town venues to take pressure off the city centre, to improved lighting and paid area 'hosts' ("less heavy-handed than the police," says Milan, though in liaison with them) to encourage good behaviour and defuse problematic situations.

However, the value of a Night Mayor does not lie in developing generic policies for other places. UNCTAD (2013) has called for the development of "specific mechanisms scaled to local enterprise development and the value-chain". Policymaking needs to be tailored to the specific needs of a place: in South Africa, for example, genuinely inclusive debate and decision-making on policy would require multilingual platforms and documentation.

Rather, the value of such an institution – whatever it is called – lies in making possible a space where economic, regulatory, creative and residential role-players can "figure out, together, how to make it work."

Internal and external partnerships: an end to planning silos

Part of 'making it work' will be far better integrated planning mechanisms (APA, 2011; Evans, 2005; UNCTAD, 2013). Area planning and zoning, cultural policy and funding, tourism and even youth policy (music education) may coincide and interact in the live music world, yet local government departments very often operate in silos in terms of their plans and budgets. UNCTAD's multiple case studies of successful, developmental cultural projects demonstrate that co-operation between diverse official role-players. The American Planning Association (APA, *ibid*) suggests that planners can engage in "deliberate team-building" to create clusters of creative activity involving both commercial and non-profit enterprises, and cites as one example the Connecticut Cultural and Tourism Partnership

Grants. Such initiatives, however, require that the relevant authorities – which may reside, in South Africa, in separate Directorates of Tourism, Arts and Culture, and Town Planning – also communicate, integrate information, and plan together.

Effective integration within regulatory authorities is only the start. The Amsterdam Night Mayor is supported by a partnership between City Hall and the business community, and partnerships that cut across formal roles can inform the debates around regulation by communicating needs and perspectives.

Behr et al (2015:10) discuss a large, successful London venue, The Roundhouse in Camden, as a case study of the complex relationship ecology underpinning a venue's success. This includes working with public authorities on the management of events and providing expertise for public education programmes in schools and technical colleges; working with major international commercial promoters on big events, and with other smaller venues in the area, including locating some of its activities in their spaces. The venue's ongoing relationships blur the lines between different public regulatory authorities, between public and private bodies and between large and small live music activities to 'make it work'.

In South Africa, the Mzansi Golden Economy and Creative Cape Town initiatives, among others, have already taken steps in this direction by providing forums where role-players can discuss across the lines. However, these initiatives are young and still exploring their full potential. Mzansi Golden Economy support has so far been most visible in relation to events and outcomes, rather than processes. Worldwide, a UNESCO Creative Cities network exists, but does not yet have any South African member cities.

It is important to remember, however, that South Africa and the southern African region are geographically varied. Big cities are often not typical of the contexts in which live music must be nurtured. The scalability of such initiatives, and how similarly integrative umbrella bodies could support live music outside the urban context will be discussed below, in the section on 'Debates and dilemmas' page 27.

*Sibusile Xaba's Unlearning Ensemble
at Cheshire Homes, Swaziland,
#MobilityFund. Photo by Reatile Molausi*



PROMOTIONAL OPTIONS FOR SUPPORTING LIVE MUSIC

Promotional area	Intervention and improvement options
Direct audience development (all role-players: authorities; corporate sponsors; media; venues & organisers)	<p>Develop innovative marketing and advertising strategies for specific live events. (Objectives A & B)</p> <p>Run generic 'support live music' campaigns. (Objectives A, B & C)</p> <p>Subsidise attendance for low-income groups: e.g. 'cultural coupons'. (Objectives C, D, E & F)</p>
Indirect audience development	<p>Increase support for music education and information in all schools and colleges – e.g. via the CSA Schools Programme. (Objectives B, C & E)</p> <p>Work with media to showcase live performers better (not just playlist quotas: informative coverage). (Objectives B & C)</p> <p>Establish effective, accessible, affordable live music promotional platforms online. (Objectives B & C)</p>
Tourism promotion	<p>Preserve and develop music heritage sites and market them proactively as tourist destinations. (Objectives A, B & C)</p>
Skills development	<p>Support education for artists, venues and cultural brokers on promotional skills and techniques. (Objectives A & B)</p> <p>Develop publicity-related skills-sharing mechanisms and platforms. (Objectives B & C)</p>

“A public campaign supporting live music could be very useful, as well as a way of accelerating the distribution of information about live music events on various platforms.”

- Aymeric Peguillan, *The Orbit, Live Music Audiences (O'Connor, 2015:61)*

The CSA Live Music Audiences research found that potential music audience members were dissatisfied with the information they could access about music events and that this was a deterrent to attendance. The survey samples were predominantly urban and, from their qualitative responses, well able to access and use social media. This suggests that even in locations where online information is widely and easily used, it is not adequate – and also suggests that the information gap may be even more severe in other places. A swift online check for the websites of some of the venues CSA surveyed (conducted on 2016/09/21, 12:51:30 SAST) supports the research findings: some do not have websites; some report only on past events via Facebook; some provide the name of a planned gig but no artist information; some do not contain an 'upcoming gigs' section. A spot-check of city music information for Johannesburg and Cape Town on the same date showed no single site

providing a full, updated listing of specific music events. Many city entertainment guide sites seem to base their listings on paying advertisers or provide only short generic accounts of venues. Remedying these deficiencies is neither complex nor costly; it merely requires one role-player to take the initiative.

However, information was a far less important audience deterrent in the CSA survey than cost. Internationally, one successful promotional initiative directed towards affordability was the Brazilian 'cultural coupons' programme, initiated in 2014 (Downie, 2014). This targeted workers earning below \$300 a month (the Brazilian minimum wage in 2014 was around \$60), providing an electronic card loaded with \$20 each month to be spent on a broadly defined local cultural activity. (At that time the sum was about sufficient for one average paperback, cinema, theatre or music visit or download.)

“...[Venues] only post one [Facebook] post per gig so you often miss things and there is no follow up.”

- Polly, *Live Music Audiences (O'Connor & Concerts SA, 2015:53)*

“...it’s the middle class and people with money that can afford to travel to attend events. I believe people would come if transport was available.”

- Modisaotsile, *Live Music Audiences (O’Connor & Concerts SA, 2015:51)*

Starting the scheme required buy-in from employers to register their workers, from unions, and from cinemas, bookshops, music promoters and others to accept the card as cash – another example of the kinds of ‘ecosystems’ that can support cultural activities. The system had benefits beyond simply promoting cultural consumption. Spending stayed in the country. In addition, there was a marginal democratisation of the power over cultural choices: no-one instructed the recipients on what their tastes should be and hip-hop gigs or downloads were as acceptable as chamber music. Initiatives like this help break down access barriers, increase event support and equalise consumption opportunities.

In 2016, Italy introduced a similar “culture bonus” scheme for 18-year-olds.

Resource support is not only – and often, not best – provided in the form of expensive fixed infrastructure that cannot respond flexibly to the volatile, project-based nature of live music activities (Ansell & Barnard, 2013). However, there are some areas where infrastructure creation is vital. By far the severest deterrent to live music attendance found by the CSA research was accessibility, directly linked to night transport availability. South Africans are not alone in facing this problem:

CONTEXT OPTIONS FOR SUPPORTING LIVE MUSIC (RESOURCES & CONDUCIVE CONDITIONS)

Context areas	Intervention and improvement options
Money	<p>Increase range of subsidies, loans and direct grants available to artists and venues for touring, promotion, equipment, etc. (e.g. CSA mobility fund). (Objectives A, B, C & D)</p> <p>Develop more and better models for assistance in kind (equipment, mentoring, event catering & beverages, promotion). These can be as useful as direct grants. (Objectives A, B, C & D)</p>
Transport	<p>Develop safe, affordable night transport that serves all areas. (e.g. build on Joburg ‘Corridors of Freedom’ development: currently daytime transport only). (Objectives A, D, E & F)</p>
Security	<p>Develop area policing/security policies and practices tailored to the character of the night economy.</p> <p>Enhance training for venue security staff.</p> <p>(Both: Objectives A & E)</p>
Space	<p>Implement measures to mitigate effects of rising property prices and rents, which can drive legacy venues and potential audience groups such as students away from music areas and destroy area character. (Objectives A & F)</p> <p>Map unused spaces and implement strategies for making them available for music events. (Objectives A&E)</p> <p>Implement measures to initiate & support SMME venues in areas where apartheid made them unviable. (Objectives A, E & F)</p>
Information/technology/data	<p>Conduct cultural mapping – as Gauteng has already done – to identify resources, strengths and development pathways. Update regularly!</p> <p>Build on existing research and employ newly established South African Cultural Observatory resources to build a fuller, more nuanced picture of the live music scene.</p> <p>Train and build local experts: encourage live music research and publication at doctoral level in higher education.</p> <p>Encourage SMMEs and promoters to employ technology such as ‘smart wristbands’ (as currently used by e.g. Oppikoppi Festival) to amass more audience data.</p> <p>(All: Objectives A & B)</p>



As indicated above, it was a major deterrent in several other highly developed countries where similar research has been undertaken. UNCTAD (2013) notes that in all developing countries, while digital communication can mitigate, to some extent, the prevailing problems of distance and remoteness, some activities still require personal contact. Live music is one of those.

However, South African transport infrastructure has some unique features inherited from apartheid. Under that regime, transport provision was designed to isolate black townships, providing only those meagre routes and services needed to bring black workers to the city during working hours, and remove them immediately thereafter. Links were not built between the townships, or between townships, peri-urban and rural communities. To plug some of those gaps, a large informal transport infrastructure grew up, privately operated via minibus-taxis ('kombis'). Because of smaller demand, poor roads, poor lighting and lack of security – and because these small operators are often driver-owners who do not relish 18-hour shifts – the kombis, too, were and remain largely daytime services.

Thus it is hard for any non car-owning participant in the night-time economy, whether as musician, service worker or audience member, to access live music outside a small, local, walkable circumference. (Individual car ownership as a solution contributes to other urban problems, including congestion, parking issues and air pollution.) Within the locality, the SMME operators of potential live venues (taverns, car washes, grill restaurants – *amachisanyama* –

and more) lack resources and often skills and experience too, and are faced with a maze of regulatory and legislative bureaucracy.

There are twin routes to solving the access problem. The first is to better-distribute live music events, bringing music to localities. We have discussed the types of regulatory facilitation that would be useful in this context above (page 20). The second is to improve transport routes and night transport services.

In Johannesburg, a start has been made on the enhancement of routes and links through the ongoing construction of what the city authority has dubbed “corridors of freedom”: new roads and lanes linking previously unlinked areas and including bus rapid transport provision. The aim is also to create new mixed-income residential areas along these routes, bringing residents closer “to work, shopping and leisure opportunities”. At present, discussion of leisure in the city’s documents on corridors of freedom is very limited – although a night bus service is mentioned as a future option – but if future planning could be linked to a night-time economy perspective, this is precisely the type of public transport innovation that is required.

The solutions of better distributing live music opportunities, and improving public transport, are complementary. Today’s player on the smaller local circuit will graduate to play higher-priced, higher-paying city-centre venues –internationally, this informal apprenticeship in smaller venues is known by musicians as “paying your dues”.

Left to Right: Siphephelo Ndlovu, Daniel Knight, Anzelle de Wet and Nhlanhla Ngqaqu. Wizowa, a Wits student jazz ensemble, performing at Buzz, Oslo Jazz Festival, Norway 2015, #Exchange. Photo by Egil Austrheim



Where we're headed: an African Music City

Imagine this: it's not too distant from how some parts of Johannesburg and Cape Town already feel, but you may notice a few vital ingredients that are currently missing (and still, far too few places feel like this)...

Thandi hops on a public bus to Umculo Square. There's a band playing in town she heard at a Sunday live session in a pub in her township. Now she wants to hear them again. The journey is long, but the bus costs only a few small coins. It's nearly nine in the evening when she arrives, but the area is alive and bustling. She used to be nervous about walking down the dark side-street to the club, but now it's clean and brightly lit. And, ever since the car guards got training and certificates, she's been able to rely on them to spot problems and help if needed.

There's music coming out of at least a dozen of the doorways she passes: if she hadn't been fixed on this band, there are plenty of others to hear. Flashing signs in the windows above catch her eye: "Afrosoul studio", "The Office of the City Night Mayor", "Blakk Records", "Ethiopian Restaurant", "Internet Café", "Afrodizzy design: Graphics, T-shirts and Fashion" – hmmm, wonder if they've got anything nice? Maybe next visit...

When she gets to the club, there's a big tour bus parked outside: Music & Heritage Tours Company seem to have brought almost a hundred people to hear this band. Will she get in? But the guy who swipes her student card for cut-price entry reassures her: "If you don't want to sit at a table, there's still plenty of space – oh, and before you go in can you please give us a contact: we're doing our audience survey next week." That's fine: standing room gets you close to the side of the stage. Thandi spots the college friends who'd texted they'd be there and joins them. They're talking to one of the musicians. "Finally," the drummer says, "we've made it to this club! We wouldn't have done it without those sponsored township tours and it's good to find some of you following us to town now." Thandi smiles. She knows it's going to be a good night, and she can relax – there will be a night bus to get her home in time, and friends to walk the last bit with.

Thandi in Music City....



Thandi's experience is a far cry from the reality of many current cities, and the vision of some policy makers. For example, the most recent *State of South African Cities* report (SACN, 2016) gives hardly any presence to arts and culture at all. Live music is mentioned only twice; concerts, performances, music and arts festivals not at all.

Debates and dilemmas: the issue of scale

We have so far discussed live music issues largely in terms of their place in cities. There are good reasons for this. UNCTAD (2013:92) notes that the creative economy "has always been located and nurtured in urban settings." Urban settings bring people together as potential audience

members and creative communities, attract talent, and offer pre-existing infrastructure of several types that can support economic, social and cultural activities.

However a third of South Africans still do not live in urban areas, and 40% of all Africans will not live in cities even by 2050, despite the rapid pace of urbanisation. "Living in cities" is, however, a broad label; many peri-urban settlements are as ill-served with facilities, including recreational facilities, as some rural areas, and UNCTAD (2011 and 2011a; 2013) and other observers (e.g. Chirowodza, 2015) have described how, in many African states it is the small towns or dedicated "growth points" that provide the entertainment districts for much larger rural surroundings. (In parts of Zimbabwe where development funds



have dried up, the only aspects of designated 'growth points' that have not withered are the places of entertainment.) Some mass of people, either resident or within easy reach, is necessary to provide adequate footfall for music events.

This should not mean, though, that what UNCTAD (2013) calls "increasingly formulaic 'creative city' agendas" should be imposed in inappropriate ways or on inappropriate locations "ignoring local opportunities and missing opportunities to galvanise already-existing or vernacular cultural expressions." The modalities of creating and supporting live music need to be as varied as the places and communities they serve.

So an important question about any support for live music is that of scale. Among the issues that need consideration are how specific types of support can be implemented on a larger scale; whether there is an optimal scale for venue viability; and whether SMME live music organisers can survive at their existing small scale. What are the approaches to scaling up that will best serve live music?

Defining scale

Even defining scale in the context of an activity – rather than a uniform product such as a recording – poses questions. Multiple identical live events would subvert the notion of 'unique experience' (and would, in any case, be difficult to achieve without programmable robot performers). More audience members are certainly a goal – but more together in the same place, or more overall, attending multiple disparate events over a period of time?

Scaling-up via mega-venues

One answer has been the creation of mega performance venues: giant stadia or casino venues that can offer the unique experience of a single live concert to many more attendees at one time. This model is certainly efficient in business terms: it offers significant economies of scale to a concert operator and can amass the resources to draw on high-quality production equipment and skills.

However, for the values cited by CSA research respondents as attractions, this model scores lower. Tight crowd control may limit freedom of movement within the venue, and there are no opportunities for interaction with artists. To attract the maximum number of audience members, stages are most often offered to artists with very broad, rather than unique or niched

appeal. Costs are high, and the location of such venues (they cannot be built in the middle of crowded urban music areas) often exacerbates transport difficulties. In addition, isolation and the high cost of tickets for a once-off event can draw people and money away from the regular, smaller-scale operation of live music in entertainment areas or tight-knit communities: one stadium concert ticket may consume a person's entire available music spending for a month. These problems exist everywhere, but are magnified in the highly unequal context of South Africa.

Mega-stadia and events certainly have their role in the music ecosystem. Maximising access and returns from the visit of a 'star' name would be exceedingly difficult without them. They offer employment and skills development to large numbers of music service workers, a platform to aspire to for some artists, and business learnings that may be useful even in less ambitious contexts. But multiplying the numbers of mega-stadia would not eliminate the deterrents ordinary music audiences report, and risk creating over-supply at that price point.

In addition, as Behr et al (2016:20) suggest, because all live music venues coexist and interact in the same ecosystem, big venue policies that "in competitive terms, make it impossible for small promoters or venues to survive will, in the long term, have a decisive impact on their own sustainability." Audiences and artists for the large shows are grown in the smaller ones.

Temporary scale: Festivals

Large-scale live music activity can be created temporarily via a festival. In a sense, a music festival is an instant, moveable music city. It provides performances and all the ancillary facilities of a 'music district', from T-shirt vendors to food stalls and plumbing.

Festivals can create short-term employment that leaves a long-term legacy of skills; they can bring the experience of live music to areas that are starved of it, can brand a place as culturally significant, and can build links between existing industries (cultural and service, including transport and tourism) and individuals in an area (or in a genre) that may have spin-offs long after the event. UNCTAD(2013:90) describes festivals as "catalytic intermediary events" for all these reasons and more.

Tretter (2015) describes how Austin, Texas became 'the live music capital of the world' not



because of any unique qualities beyond a large number of resident musicians, but rather because a strategic branding decision was taken by the city's growth coalition to adopt and build that identity. A significant part of the building was done via two commercial festivals: South by Southwest (SXSW) and Austin City Limits. It was a symbiotic relationship: as Austin's identity grew, the festivals flourished; as the festivals flourished, they reinforced that identity. As isolated events in their early years, the festivals were instances of short-term scaling. What they contributed to long-term, however, was one of the world's most successful music cities.

None of these benefits of festivals is automatic. A festival can as easily bring its audience and support staff with it, price local community members out of attendance, and eschew cultural innovation and vibrancy in favour of safe hospitality revenue. While a festival can temporarily assist a place to scale up its music activities, and leave a useful skills and reputational legacy, the crucial consideration is: "What kind of festival?"

"[Audience development is partly] about increasing the size of the audience across the city, so that artists and promoters can build sustainable careers in live music."

- Lindy Mtongana, *Jozi Unsigned*,
CSA research (O'Connor and Concerts SA, 2015)

'Umbrellas' serving multiple small live music venues or events

If the goal is not necessarily to multiply audience numbers to fill a single mega-venue, what other approaches are possible? There are several, including:

- Achieving higher audience numbers aggregated from multiple diverse smaller music performances (scaling performance numbers).
- A higher number of venues meeting more uniform production and promotion standards (scaling quality).
- Increased regularity of events (scaling opportunity for musicians and access for audiences).

For achieving these types of scaling, 'umbrella' music support organisations have already demonstrated their utility.

"I would not have known what other venues are doing if we had not come together in one room through Concerts SA. Competition is good for the sector, but if we all work together we can help each other grow."

- Nikiwe Rwaxa, *Niki's Oasis, Live Music Audiences* (O'Connor and Concerts SA, 2015:61)

Such bodies can be created in many ways: by commercial, governmental, donor or grassroots organisations, or via consortia involving some or all of these. They can accommodate what UNCTAD (2013:26) calls "the loosely configured emergent networks of cultural producers and consumers that drive innovation ..., the collectives, micro-enterprises, vendors' associations and guilds [that, in the developing world] occupy the place of major cultural institutions and bureaucracies as creative agents." From South African history, one might cite the efforts of the apartheid-era Performing Arts Councils, which supported tours designed for isolated, low-income Afrikaner farming communities: staging performances on a regular calendar in churches and school halls – while that specific repertoire was exclusionary, the audience development model was very successful indeed.

Today, CSA offers regional and national mobility support to touring performers of diverse types, from jazz to hip-hop to rock music, as well as training opportunities. They also run school and venue circuits. Another example might be Business & Arts South Africa, which serves small cultural enterprises by brokering relationships with mentoring and resource providers. And one less obvious example of a support 'umbrella' is a local authority. When infrastructure is scaled up to support business and commerce in an area, a multiplicity of small (including music) businesses benefit, and the area becomes more attractive to potential audiences.

Even an umbrella may become too big. In their case studies of UK venues, Behr et al (2016:20) observed that "the bigger a company gets, the less its centralised components understand how new musical communities, new musical places, appear and develop. Interactions at ground level increasingly become the province of staff...whose immediate concerns are different from those of corporate strategists." This is a risk run by any cultural authority operating on a large scale, not only by the big commercial venue "chains" that Behr et al studied.



DIRECTIONS FOR FUTURE RESEARCH

More research on audience

The CSA report *Live Music Audiences* (O'Connor, 2015), has begun the process of addressing one important research gap noted by *Songlines* (Ansell & Barnard 2013a): the questions around audience behaviour and preferences. Albeit via a relatively small sample, the CSA research has illuminated what audiences – especially young audiences – prefer and dislike in venue provision. That this research has strong consonance with similarly-focused international research, but nevertheless identifies important points of South African difference, is evidence for its robustness.

One future research direction, therefore, is simply to extend this research across a greater number of different audience samples to accommodate the complexities of the South African cultural landscape.

Another direction, arising directly from the *Live Music Audiences* findings, is to explore more intensively the nuances they raise: to direct a focused research lens on, as only one example, providing safe, affordable night transport, and develop specific, concrete proposals, tailored to context, to remedy the problem. A number of other issues from *Live Music Audiences* beg this approach, including perceptions of social exclusion and technologies for audience database development.

Definitions of music genres

Some research questions raised by *Song Lines* remain inadequately answered. These include how music consumers define genres. There are still no research tools to pin down what respondents mean by the genre labels they employ. Some features of music-related behaviour, on both the production and reception sides, may be niche-specific – for example, many traditional genres already run successful but distinctive touring circuits. More precise information here would assist in better targeting of appropriate support.

Secrets of success

Song Lines and *Live Music Audiences* both identified venues that were comparatively long-lived in a very volatile industry. Micro-studies of these venues have the potential to provide indigenous models for business survival.

Evaluation of cultural planning processes

Both Cape Town and Durban have embarked on implementing city-wide cultural planning models; the Mzansi Golden Economy is a national project to reinforce the creative industries sector as a driver of growth and employment. As these progress, it is necessary to examine their benchmarks, whether they are reaching them, and what (planned and unplanned) outcomes are emerging. Better understanding of such initiatives will assist in positioning live music within them. In addition both macro and micro-level studies could illuminate entrepreneurial attitudes to regulation and the potential for leveraging tax income from the sector.

The project-based business model

It has been repeatedly noted (UNCTAD, 2008, 2010, 2013; Frith et al 2016; Ansell & Barnard 2007, 2013 and 2014a) that many live music activities are short-lived and project-based, and that rather than being a weakness, this is a useful mode of operation among creative industries. However, there is relatively limited literature on how this project-based model functions in business terms, in music specifically or in a developing country context. Like long-lived venues, this is another area where grounded micro-studies could provide both insight and models.

'Going to scale'

As indicated in the preceding section, scaling up live music activities is far less well understood than scaling up a uniform recorded music product. Just as the considerations around scaling differ between live music events and commodity manufacture, they may also differ in relation to different genres of music or different types of location. To enhance the viability of venues and events, alternative models for scaling need to be developed. This is especially important in planning support for live music activities in more limited contexts such as rural or township areas.

The establishment of the South African Cultural Observatory in 2016 offers the prospect of more research resources and expertise to undertake these explorations. Hopefully, more graduate students from a range of disciplines will find that the areas of live music and music business research offer opportunities to make unique contributions to knowledge.



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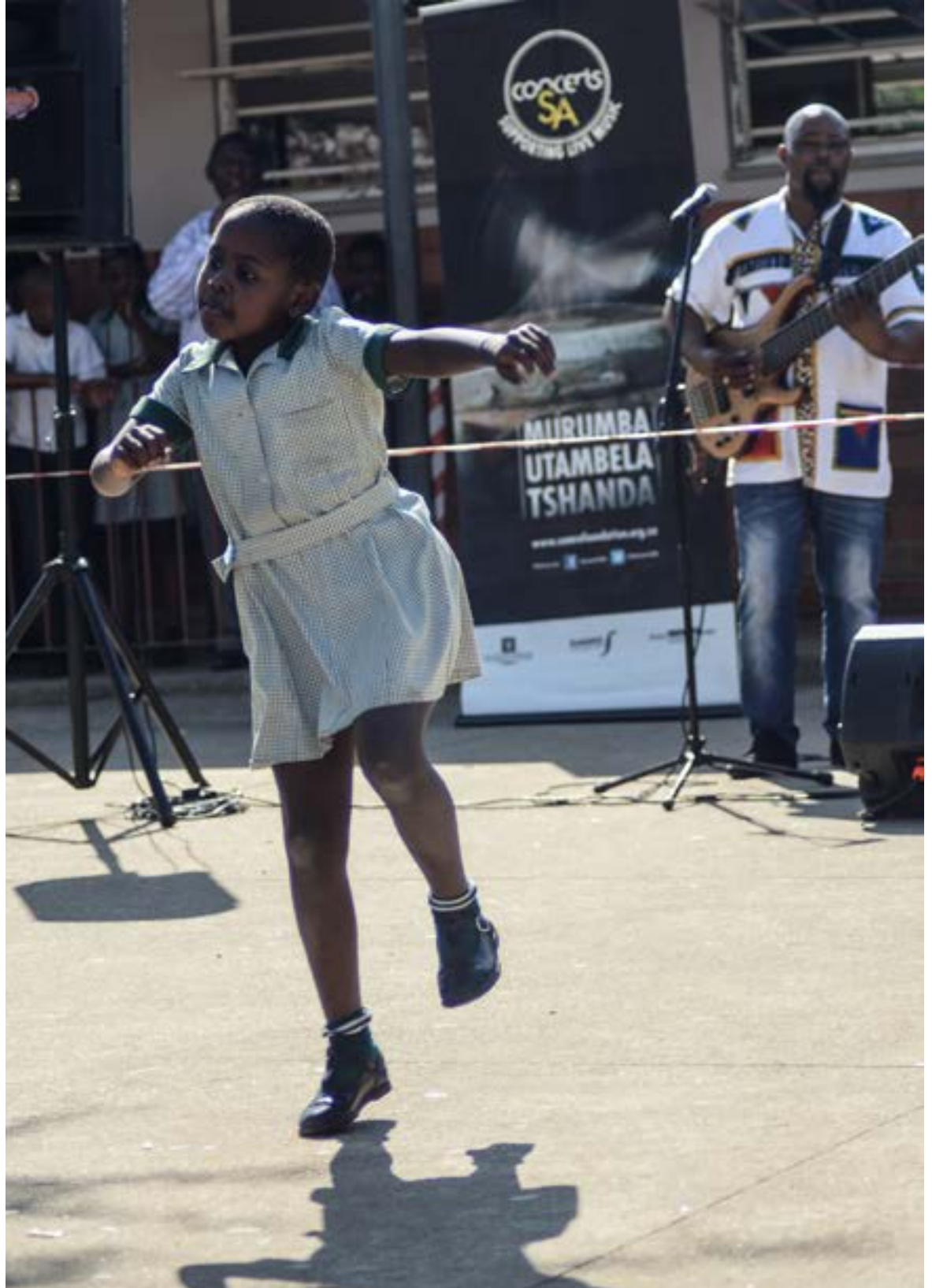
APA	American Planning Association
APRA	Australian Performing Rights Association
BASA	Business and Arts South Africa
BET	Black Entertainment Television (network)
CSA	Concerts South Africa
GDP	Gross Domestic Product
IFPI	International Federation of the Phonographic Industry
MMINO	The South African – Norwegian Co-operation in Music programme
Moshito	Annual South African music conference and exhibition
NEA	National Endowment for the Arts
NGO	Non-Governmental Organisation
PwC	PricewaterhouseCoopers
SACN	South African Cities Network
SAMRO	Southern African Music Rights Organisation
SMMEs	Small, Medium and Micro Enterprises
SXSW	South by Southwest (Texas music festival)
UK Music	Cross-sectoral British campaigning and lobbying group for the music industry
UNCTAD	United Nations Conference on Trade and Development
UNESCO	United Nations Scientific and Cultural Organisation





Home concert set-up for Julian Redpath performance, Johannesburg, #MobilityFund. Photo courtesy of the artist





At a Qadasi performance, Nsimbini Primary School, Umkumbaan, KwaZulu-Natal, #SchoolCircuit. Photo by Vulane Mthembu