

# The Music Blueprint

An analysis of the skills needs of the **music** sector in the UK  
March 2011



**Creative & Cultural Skills** is the Sector Skills Council for the UK's creative and cultural industries, including craft, cultural heritage, design, literature, music, performing arts and visual arts. Founded in 2004, we were granted a new licence from Government to operate in January 2010.

Our goal is to enable the creative and cultural industries to reach their economic potential through relevant skills and training. We work strategically with employers and partners to:

- Understand the skills needs of the industry and ensure that employers' voices are heard
- Support entry into the sector and progression routes through it
- Improve careers advice and guidance
- Ensure the industry can access the right training, qualifications and apprenticeships
- Help higher and further education to work in closer partnership with the sector

For further information, please visit [www.ccskills.org.uk](http://www.ccskills.org.uk).

***The Music Blueprint*** is part of The Creative Blueprint, Creative & Cultural Skills' Sector Skills Agreement with the UK Commission for Employment and Skills. The Creative Blueprint for England, Scotland, Northern Ireland and Wales is available at [www.ccskills.org.uk](http://www.ccskills.org.uk).

**The National Skills Academy** for Creative & Cultural operates as a network of theatre and live music employers, freelancers, and industry trade associations, working together with 20 Founder Colleges across England to develop, improve and recognise skills – initially for 'backstage' and 'offstage' roles in theatre and live music events. The Skills Academy provides services and standards for training and skills development, endorsed by industry employers and professionals.

The Skills Academy is one of 16 Skills Academies which have received development funding from the Learning and Skills Council as part of the Government's Specialisation programme. The Skills Academy hopes to see similar delivery programmes or networks in Scotland, Northern Ireland and Wales.

[www.nsa-ccskills.co.uk](http://www.nsa-ccskills.co.uk)

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## Foreword

The UK's music sector is one of the most successful across the globe. As both a cultural and economic export it is world-famous. From gigs and festivals to CDs, MP3s and mobile downloads, and from orchestral performances to community and educational initiatives, the sectors' breadth of genre and experimentation is breathtaking.

*The Music Blueprint* comes at a time of great change, great opportunity and great risk for the music sector in the UK. New digital platforms have opened up a wealth of opportunities and new business models. These opportunities bring with them new or enhanced skills needs, from technical and leadership skills to the navigation of copyright and file-sharing legislation. Our research amongst employers and freelancers in the music sector has highlighted their concerns over the suitability of current training for both new entrants and existing personnel.

In 2009 we set up our National Skills Academy for Creative & Cultural, a network of creative and cultural employers and organisations, freelancers, educators and training providers, unions and industry trade associations working together to develop, improve and recognise skills. The Skills Academy is focusing initially on technical roles in live music events and theatre across England. Its intention is to ensure that, in an industry where the speed of technological development can be astonishing, technical training is delivered in working environments with access to the most up-to-date resources.

More broadly, Creative & Cultural Skills is committed to ensuring that the music sector has the right skills to thrive in the context of economic uncertainty and technological change. We believe that it is essential that there is proper information, advice and guidance on offer to both individuals and businesses in the music sector. We want to make sure every business can access the full range of work-related training opportunities, from accredited vocational qualifications, including Apprenticeships, to peer mentoring and networking opportunities. We also want to see higher education institutions working with industry to develop and deliver the most relevant, valuable courses. Only then can we be sure that we are in a strong position, not just to survive, but to retain the impressive level of growth, global reputation and expertise the UK's music sector has seen over the last twenty years.

*The Music Blueprint* is for everyone in the industry, from freelancers to directors of major corporations, from those early in their career to senior managers, from specialists in a certain area to those working across different musical genres and sectors. It can be used to make your case, prove your worth and to inform your business and training plans. Together we make up a world-renowned sector, one of which we should all be immensely proud. Let's keep it that way.



**Alison Wenham**

Chief Executive, Association of Independent Music  
Trustee, Creative & Cultural Skills



**Caroline Felton**

Chief Executive  
Creative & Cultural Skills





Young Musicians Weekend

Mark Savage

02

03

# 01

## Introduction





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# Introduction







## Introduction

This document is for anyone seeking official data on the key drivers of change in the music sector (Section 2.1), its demographic make-up and economic impact (Section 2.2), its skills levels and skills gaps (Section 2.3), its training habits (Section 3.1), and how it accesses funding for training (Section 3.2).

## Background

As part of our licensing agreement with the UK Commission for Employment and Skills (UKCES), Creative & Cultural Skills is required to provide a snapshot of our sector of the UK economy, presenting robust, comparable and comprehensive labour market intelligence across the four UK nations. This describes what is happening in the labour market or in employment, using data about the numbers of people employed, skills needs and salaries. Importantly, all Sector Skills Councils collect labour market intelligence within a common framework so that it is possible to compare sectors and to map trends in the UK economy as a whole.

## Methodology

*The Music Blueprint* sets out our research findings. The data comes from our ongoing research programme, including:

- *The Creative Blueprint*, which surveyed over 2,000 employers across the sectors represented by Creative & Cultural Skills. This research identified key themes for future development: leadership; diversity; entry to the sector; careers advice and guidance; continuing professional development; and business support.
- Our biennial Workforce Survey, through which we consult over 1,000 UK employers on key workforce issues using surveys and focus groups.
- Our biennial Impact & Footprint demographic data, collected at national level by Government (for example, through the Annual Business Enquiry and the Inter-Departmental Business Register).
- The UK Music Skills Audit, a survey of the sector's skills and training habits carried out in collaboration with UK Music in summer 2010, which garnered over 500 responses.

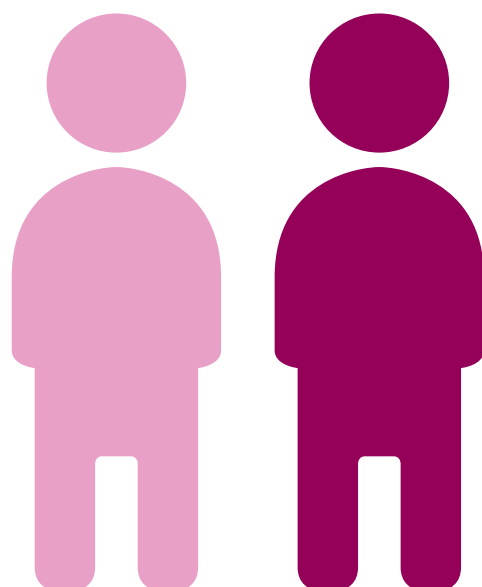


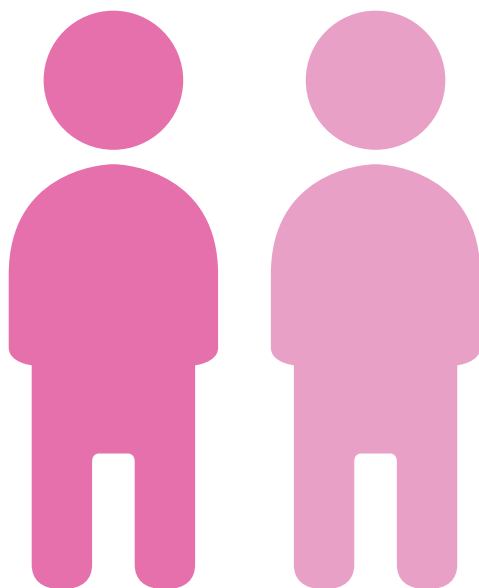


Image courtesy of  
Hallé Concerts Society.

*The Music Blueprint* looks in detail at the skills needs of the music sector. It does not cover audience trends and performance, which can be found in the Government's Taking Part survey in England, which collects data about engagement in culture, leisure and sport<sup>1</sup>. Additional information on public sector-funded music organisations is available through, for example, the UK Arts Councils' annual surveys of their regularly funded organisations.

*The Music Blueprint* is also informed by our ongoing programme of employer engagement. We aim to ensure that the music sector's skills needs are properly researched and conveyed to Government, and that programmes of work such as Apprenticeships are communicated to the sector. Activity such as the UK Music Skills Audit makes sure that our priorities and activities are directly shaped by the needs of our industries.

While this document highlights key skills challenges (see Section 4), it does not seek at this stage to present an action plan or fully-scoped recommendations for action. Instead, we look forward to working with key partners in the music sector after the publication of *The Music Blueprint* to make sure that any activity aiming to address these skills challenges is well formulated, targeted and accessible.



<sup>1</sup> See [http://data.gov.uk/dataset/taking\\_part\\_-\\_englands\\_survey\\_of\\_culture\\_leisure\\_and\\_sport](http://data.gov.uk/dataset/taking_part_-_englands_survey_of_culture_leisure_and_sport)

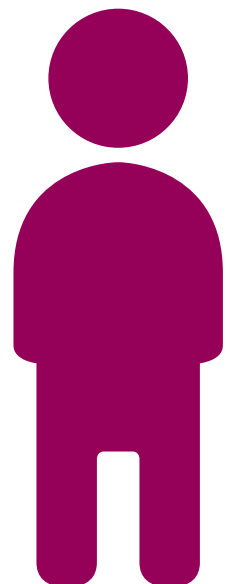
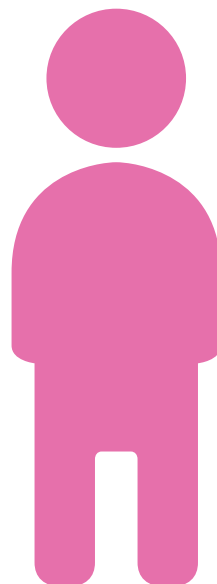
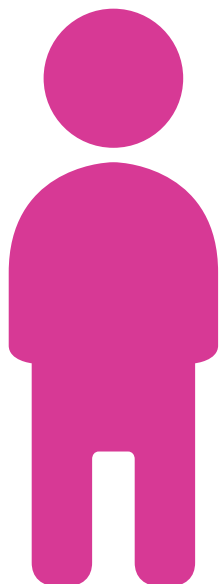


Welsh Music Foundation's (WMF) tenth birthday celebrations. Photography by Missionphotographic.com.

### Using the information in *The Music Blueprint*

We have collated our research data on the profile of the music sector, its training habits and needs, its skills issues and qualification levels, and key areas which we think need further development. This data is also available online via our Data Generator tool ([www.data-generator.co.uk](http://www.data-generator.co.uk)), which allows users to filter and compare data by region, subsector and working practice (e.g. self-employment rates).

You can use this data in research papers, presentations and funding bids. Most importantly, it can be used to inform your business and training planning – whether you are a sole trader or a manager of hundreds – to ensure that your staff members (and therefore your business) are supported to develop and grow.



# 02

## Profile of the music sector



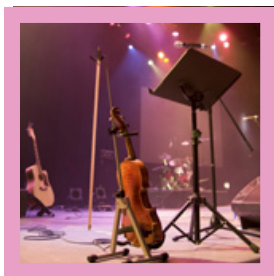
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# Profile of the music sector





## Headline statistics

This data presents a snapshot of the make-up of the music sector at the time the data was collected<sup>2</sup>.

- There are 7,900 businesses in the UK's music sector.
- There are 124,420 individuals working in the sector, 47,460 of whom are freelance.
- 92% of businesses in the music sector employ fewer than ten people.
- 93% of the industry is white, and 61% is male.
- 78% of the music sector earns less than £20,000 a year.
- 48% of all those working in the music sector do so in London and the South East of England.
- 4% of the sector works in Wales, 8% in Scotland and 3% in Northern Ireland.
- 30% of music businesses engaged in staff training in 2008/2009, but only 10% of these accessed public funding to do so.

## What do we mean by the music sector?

For the purpose of this document we are defining the music workforce as anyone involved in performing, creating, producing, recording, promoting and selling music in the UK. This includes musicians and composers, national and regional orchestras, the recording industry and its retail and distribution arms, royalties and collection societies, live venues and festivals (both commercial and subsidised), music publishers, artist management and promotion, and the audio sector. Those music professionals who work in educational settings are also covered here, as are those involved in the production and repair of musical instruments and audio equipment.

There is a range of business models in the music sector, including publicly-subsidised music organisations and venues, commercial companies and venues, and not-for-profit organisations. These organisations range in size from multi-national corporations and national foundations through to small and medium-sized companies and freelancers/sole traders.

Data on live music venues and performers, including opera companies, crosses over into Creative & Cultural Skills' research into the performing arts sector; those seeking a full picture of the workforce data available in this area should use *The Music Blueprint* hand in hand with *The Performing Arts Blueprint*, published in 2009 and downloadable at [www.ccskills.org.uk](http://www.ccskills.org.uk).

<sup>2</sup> Inter-Departmental Business Register (see <http://www.statistics.gov.uk/idbr/idbr.asp>)

## Examples of professional roles in the music sector

The UK's music sector is dynamic, innovative and fast-moving, and the range of job roles available follows suit. Many of those working in the sector take on more than one role at a time, or adjust the role to suit the needs of their business. The following list presents just some of the professional roles in the music sector.

- A&R: artists & repertoire
- Accompanist
- Agent
- Arts administrator
- Audio engineer
- Audio equipment manufacturer
- Booking agent
- Collection society executive
- Community musician
- Composer/arranger
- Concert promoter
- Conductor
- Distributor
- DJ
- Education officer/workshop leader
- Event programmer
- Events manager
- Instrumental teacher
- Licensing and royalties officer
- Lighting technician
- Live event technical support
- Lyricist (talent scouting)
- Manager
- Mixer
- Musical director
- Musical instrument maker
- Musical instrument distributor
- Musician/artist (both lead and session)/performer
- Music librarian/archivist<sup>3</sup>
- Music publisher
- Music therapist
- Programmer
- Press officer
- Promoter
- Producer
- Remixer
- Retailer
- Sales staff – distribution and retail
- Songwriter (both local authority and private)
- Sound engineer
- Sound technician
- Studio manager

The business of the music sector is also dependent on roles in other areas such as administration, finance, marketing, customer services and IT.

### 2.1. Key drivers of change

*The Music Blueprint* comes at a time of change. Subsidised organisations such as orchestras, music education services and community bodies need to find new ways to generate income in the face of changes to public funding structures. In contrast, the live sector has seen a surge of private investment, meaning that people with the right skills need to be in place to support this growth. Meanwhile, commercial businesses dealing in recording, artist management, promotion, licensing, royalty collections and publishing are grappling with the challenges posed by copyright and intellectual property issues in the digital age, most notably peer-to-peer (P2P) file-sharing and the licensing of legal alternatives.

The explosion of digital platforms and formats has transformed the way in which consumers access, buy and exchange music. It is an exciting time, but also one that brings with it the need to embed and nurture business development and management skills within an organisation. Without these skills, any business model will find it hard to sustain itself after the initial surge of interest in a new product.

<sup>3</sup> Music librarians and archivists can be said to form part of the broader music sector. However, as they are represented by Lifelong Learning UK ([www.lluk.org](http://www.lluk.org)), our sister sector skills council, they are not included in the data in *The Music Blueprint*.



Some parts of the sector have very specific needs when it comes to training – for example, the live music sector requires extremely large spaces and specialist equipment to demonstrate specialist skills outside of a pressured performance setting. Meanwhile, those working in the fast-changing audio sector have very particular skills requirements in terms of operating audio equipment.

The music sector also faces increasing international competition, though there are also clearly opportunities for all parts of the industry to sell to foreign markets. It is important that these routes to market are accessible. The commercial music industry is active in developing these markets, and is at the forefront of driving international opportunities forward. In terms of public sector support, UK Trade & Investment, Arts Council England and the British Council all contribute in different ways, as well as through joint and joined-up activity, to supporting artists, songwriters, groups and businesses to promote their products and services abroad. Key areas of their activities include supporting showcasing and the promotion of music performances at international conferences and festivals, and international networking.

## 2.2. Demographic profile and economic impact

### Size of the music sector

There are 7,900 businesses in the music sector<sup>4</sup>; the vast majority (92%) employ fewer than ten people (see Table 1). The music sector is economically productive, with the average contribution to the UK economy standing at £31,800 per head per year (less than across the creative and cultural industries as a whole, which stands at £35,310 per head per year).

Table 1: Music sector market features compared with other creative sectors

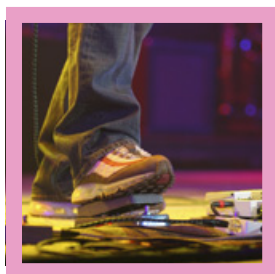
|  | Number of businesses | Businesses employing fewer than 10 people | Gross Value Added (GVA) <sup>4</sup> | Contribution to GVA per head pa |
|--|----------------------|---|--------------------------------------|---------------------------------|
| <b>Music</b>                                       | 7,900                | 92%                                       | £3.96 billion                        | £31,830                         |
| <b>Craft</b>                                       | 18,750               | 89%                                       | £3.1 billion                         | £40,760                         |
| <b>Cultural heritage</b>                           | 1,010                | 70%                                       | £5.55 billion                        | £126,240                        |
| <b>Design</b>                                      | 15,070               | 96%                                       | £8.25 billion                        | £31,320                         |
| <b>Literature</b>                                  | 11,980               | 98%                                       | £2.02 billion                        | £24,870                         |
| <b>Performing arts</b>                             | 10,490               | 95%                                       | £3.51 billion                        | £23,690                         |
| <b>Visual arts</b>                                 | 1,370                | 80%                                       | £0.34 billion                        | £7,650                          |
| <b>Creative and cultural industries as a whole</b> | 66,910               | 92%                                       | £28.03 billion                       | £34,110                         |
| <b>UK economy as a whole</b>                       | 2,152,400            | 89%                                       | £915.3 billion                       | £31,800                         |

Creative & Cultural Skills. (2010). *Creative and Cultural Industries: Impact and Footprint 2010/11*. Creative & Cultural Skills.

The largest subsectors in terms of employment size are live performance (42% of the sector: see Table 2) and the production, retail and distribution of musical instruments and audio equipment (29% of the sector). While each member of the music sector will have been assigned to the category in which they carry out the majority of their work, it is worth noting that a high number of individuals take on more than one role in a 'portfolio' career, particularly in the live performance, administration ('promotion, management and agency-related activities') and education subsectors.

<sup>4</sup> At the time of data collection; see Section 1: Methodology.

<sup>5</sup> Gross Value Added (GVA) measures the contribution to the economy of each individual producer, industry or sector in the United Kingdom. GVA consists of GDP minus taxes on products, but plus subsidies on products – see <http://www.statistics.gov.uk/cci/nugget.asp?ID=254> for more information.

Table 2: Music employment figures<sup>6</sup>

| Sector   | Total 2010/11  |
|--|----------------|
| Composition of musical works & music publishing                          | 8,760          |
| Live performance   | 51,580         |
| Music education  | 6,970          |
| Promotion, management & agency-related activities                        | 1,300          |
| Production, retail & distribution of musical instruments/audio equipment | 33,390         |
| Recording (including music production)                                   | 14,530         |
| Retail & distribution of recordings                                      | 7,880          |
| <b>Total</b>   | <b>124,420</b> |

Creative & Cultural Skills. (2010). *Music: Impact and Footprint 2010/2011*. Creative & Cultural Skills.

### Who works in the music sector?

Table 3: Profile of music sector employees

|  | Self-employment | Part-time work | % of women | Black, Asian and Minority Ethnic (BAME) | % aged under 40 |
|--|-----------------|----------------|------------|---|-----------------|
| <b>Music</b>                                       | 36%             | 33%            | 39%        | 7%                                      | 38%             |
| <b>Creative and cultural industries as a whole</b> | <b>44%</b>      | <b>26%</b>     | <b>41%</b> | <b>7%</b>                               | <b>49%</b>      |
| <b>UK economy as a whole</b>                       | <b>13%</b>      | <b>26%</b>     | <b>46%</b> | <b>9%</b>                               | <b>47%</b>      |

Creative & Cultural Skills. (2010). *Creative and Cultural Industries: Impact and Footprint 2010/11*.

Creative & Cultural Skills.

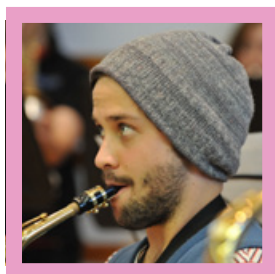
Creative & Cultural Skills. (2010). *Music: Impact and Footprint 2010/11*. Creative & Cultural Skills.

The music sector has high levels of both part-time work (7% higher than across the creative and cultural industries in general) and self-employment. Its gender and ethnicity mix is largely in line with the rest of the creative and cultural sector, while its workforce is on average slightly older than the rest of the creative and cultural industries.

The music sector has slightly more of a presence in Scotland, Wales and Northern Ireland than the creative and cultural industries in general. In contrast, there is a greater concentration of music businesses in London and the South East of England than across the creative and cultural industries as a whole, which suggest that many parts of the music sector thrive best in urban settings.

<sup>6</sup> These figures detail the number of individuals working in each subsector rather than full-time equivalents, and therefore include part-time workers. The classifications used reflect official Government Standard Occupational Classification codes. These classifications were revised in 2010, so these figures are not comparable with Creative & Cultural Skills' 2008/2009 Music Impact and Footprint data.





Saxophonist at the Royal College of Music (RCM).  
Photography by Chris Christodoulou.

Table 4: Music sector employment distribution by region

| Nation                   | Music employment | Creative and cultural employment | UK employment |
|--------------------------|------------------|----------------------------------|---------------|
| England                  | 85%              | 88%                              | 84%           |
| London                   | 29%              | 25%                              | 14%           |
| South East               | 19%              | 16%                              | 14%           |
| North West               | 8%               | 8%                               | 11%           |
| East of England          | 7%               | 7%                               | 9%            |
| South West               | 7%               | 9%                               | 9%            |
| West Midlands            | 5%               | 7%                               | 8%            |
| Yorkshire and the Humber | 5%               | 6%                               | 8%            |
| East Midlands            | 3%               | 6%                               | 7%            |
| North East               | 3%               | 3%                               | 4%            |
| Scotland                 | 9%               | 7%                               | 9%            |
| Wales                    | 4%               | 4%                               | 5%            |
| Northern Ireland         | 3%               | 2%                               | 3%            |

Creative & Cultural Skills. (2010). *Creative and Cultural Industry: Impact and Footprint 2010/11*. Creative & Cultural Skills.

UKCES. (2009). *Employment and Skills Almanac*. UKCES.

### How long do people tend to stay in the music sector?

In terms of the length of time people have worked in the music sector, there is a significant peak in the 'one to five years' bracket for all subsectors. This may reflect the fairly hierarchical nature of many music businesses (meaning that there are more vacancies at junior levels). It may also suggest that there is a tendency for individuals to leave the sector after a certain period of time, perhaps due to low pay levels or the intense competition for work.

Those subsectors with high numbers of freelancers – most notably live performance and musical education – tend to retain individuals the longest (41% and 43% respectively have worked in those areas for over ten years). The composition and music publishing subsector, however, does not follow this trend – despite the tendency for most composers to be freelance or self-employed, individuals in this part of the music sector seem to be stay for shorter periods of time than others.

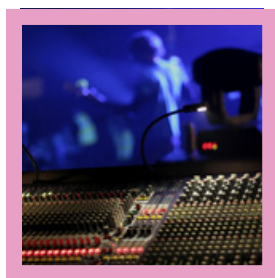
The retail and distribution subsector has the highest staff turnover; only 12% of individuals have been in the sector for longer than ten years.

Table 5: Length of time in the music sector<sup>7</sup>

| Subsectors   | Less than a year | 1 to 5 years | 5 to 10 years | 10 to 20 years | 20+ years |
|--|------------------|--------------|---------------|----------------|-----------|
| Composition of musical works & music publishing                            | 10%              | 45%          | 23%           | 11%            | 11%       |
| Live performance   | 10%              | 32%          | 17%           | 22%            | 19%       |
| Musical education  | 10%              | 34%          | 14%           | 24%            | 19%       |
| Production, retail & distribution of musical instruments / audio equipment | 19%              | 35%          | 15%           | 20%            | 11%       |
| Promotion, management & agency related activities                          | 12%              | 39%          | 22%           | 16%            | 11%       |
| Recording  | 13%              | 39%          | 24%           | 20%            | 4%        |
| Retail & distribution of recordings  | 28%              | 55%          | 5%            | 10%            | 2%        |

Creative & Cultural Skills. (2010). *Music: Impact and Footprint 2010/11*. Creative & Cultural Skills.

<sup>7</sup> While each member of the music sector will have been assigned to the category in which they carry out the majority of their work, it is worth noting that a high number of individuals take on more than one role in a 'portfolio' career, particularly in the live performance, administration ('promotion, management and agency-related activities') and education subsectors.



## 2.3. Skills gaps

### What are the current skills levels of the music sector?

The music workforce is highly-qualified when compared with the UK working population in general (see Table 6).

Table 6: Current skills levels of the creative and cultural industries<sup>8</sup>

| Sector       | Below Level 2 or no qualifications | Level 2 | Level 3 | Level 4+ |
|--------------|------------------------------------|---------|---------|----------|
| Music sector | 13%                                | 21%     | 24%     | 42%      |
| UK total     | 14%                                | 26%     | 22%     | 37%      |

Creative & Cultural Skills. (2010). *Creative and Cultural Industry: Impact and Footprint 2010/11*. Creative & Cultural Skills.

Figures in the table above exclude “other” and “don’t know” answer categories.

While these figures show that the music sector is highly-qualified, employers are still concerned about the fact that many job applicants lack key work-related skills. These range from transferable skills such as literacy and numeracy (45% of businesses stated this as one of the reasons they experienced recruitment problems; see Table 7) to specialist skills (48% of businesses). While new entrants to the sector may have the right qualifications on paper, they are not always equipped with the right skills. As a result, new recruits are usually in need of further training on the job. Professional associations and trade associations play a key role in delivering on-the-job training of this kind.

This suggests that there is a disparity between what is available through the formal education sector and what the music industry actually needs. However, only 15% of businesses put their recruitment issues down to a problem with appropriate qualifications. This implies that many employers are used to the fact that the education system produces graduates without the skills they need in their business, without questioning what could be done.

Table 7: Reasons Given for Recruitment Problems

|   | Music | Creative and cultural industries in general |
|---|-------|---|
| Applicants lack the experience                            | 63%   | 43%   |
| Applicants lack the specialist skills                     | 48%   | 38%   |
| There have been few or no applicants                      | 39%   | 24%   |
| Applicants lack the transferable skills                   | 45%   | 23%   |
| Applicants tend to have poor attitudes and low motivation | 30%   | 15%   |
| Firm unable to meet applicant expectations                | 5%    | 13%   |
| Applicants lack the qualifications                        | 15%   | 6%  |
| Other   | 5%    | 5%  |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

<sup>8</sup> Level 2 refers to GCSEs at A\*-C grade, Level 2 NVQs and similar qualifications; Level 3 to A-levels, BTEC Diplomas and the International Baccalaureate; and Level 4+ to qualifications such as degrees or Professional Diplomas.



Donald Runnicles conducting the BBC Scottish Symphony Orchestra. Photo by John Wood. Courtesy of the BBC.

Evidence also suggests that, when staff in the creative and cultural industries do undertake formal training, only 17% is focused on 'associate professional and technical roles'<sup>9</sup>. These are roles that require a specialist skill, such as audio engineering or programming roles, though musicians' instrumental skills also fall under this category. Forty-three percent of job roles in the music industry are classified as roles needing specialist skills (as opposed to 15% of job roles across the whole economy). In effect, large swathes of the music industry are composed of apparently highly-qualified recruits who do not have the specialist skills that nearly half of jobs require (see Table 8) and who tend not to prioritise the right kind of training to equip them with these skills.

Some music organisations, though less so in the commercial sector, also have a tendency to recruit general arts graduates to roles that do not require higher level or arts-specific qualifications. In areas such as IT, finance, customer services and administration, employers sometimes prioritise a passion for or knowledge of the sector over and above the necessary technical skills, meaning that they miss out on the full range of talented potential applicants from other areas of study or without formal qualifications.

Table 8: Occupational breakdown of the creative and cultural industries

| Occupational category   | Music industry | Creative and cultural industries | UK total |
|---|----------------|----------------------------------|----------|
| <b>Managers and senior officials (e.g. venue manager)</b>                           | 15%            | 7%                               | 16%      |
| <b>Professional occupations (e.g. finance officer)</b>                              | 8%             | 13%                              | 13%      |
| <b>Associate professional and technical (e.g. musician, sound technician)</b>       | 43%            | 62%                              | 15%      |
| <b>Administrative and secretarial (e.g. arts administrator)</b>                     | 6%             | 3%                               | 11%      |
| <b>Skilled trades occupations (e.g. audio equipment manufacturer)</b>               | 7%             | 7%                               | 11%      |
| <b>Personal service occupations (e.g. tour chef)</b>                                | 1%             | 1%                               | 9%       |
| <b>Sales and customer service occupations (e.g. box office staff)</b>               | 10%            | 2%                               | 8%       |
| <b>Process, plant and machine operatives (e.g. musical equipment manufacturing)</b> | 3%             | 2%                               | 7%       |
| <b>Elementary occupations (e.g. unskilled employees)</b>                            | 8%             | 4%                               | 11%      |

Creative & Cultural Skills. (2010). *Creative and Cultural Industry: Impact and Footprint 2010/11*.

Creative & Cultural Skills.

Column totals equal 101% following the rounding-up of percentage rates.

### What type of skills gaps are music businesses faced with at present?

Skills gaps are skills that existing staff need but lack. This includes sole traders referring to their own skill sets.

A significantly high proportion of businesses in the music sector identify skills gaps in their current workforce. Creative & Cultural Skills' Workforce Survey places the figure at 30% of businesses across the whole music sector<sup>10</sup>. In the commercial music industry, the figure is much higher; the UK Music Skills Audit undertaken by Creative & Cultural Skills and UK Music in summer 2010 puts the figure at 74%<sup>11</sup>.

<sup>9</sup> United Kingdom Commission for Employment and Skills. (2010). *Employment and Skills Almanac*. UKCES.

<sup>10</sup> Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

<sup>11</sup> Creative & Cultural Skills. (2010). *UK Music Skills Audit* [online survey running May-July 2010]. Creative & Cultural Skills. The difference in these figures may in part be due to the fact that the Workforce Survey is a biannual survey of a random sample of businesses across the whole music sector, while the Skills Audit called for responses to an online survey, meaning that respondents were self-selecting to some degree.



In a sector where 92% of businesses employ fewer than ten people, many individuals may, through necessity, take on a variety of different roles outside of their area of expertise. For example, an employee in a small regional orchestra who originally trained as a marketing manager might also take on a finance and risk management role, while a member of the music publishing sector running a hire library may find themselves working in promotion. As a result, the industry suffers from generic skills gaps (including IT, marketing and communications skills) as well as sector-specific skills (including copyright and licensing management skills).

**Table 9: Most frequently cited skills gaps in music businesses (by survey respondent type)**

| Employees           | Working proprietor   | Self-employed (sole trader/freelancer) |
|---------------------|----------------------|--|
| Sales and marketing | Business development | Marketing                              |
| Management          | Marketing            | Finance/accounting                     |
| Finance/accounting  | IT                   | IT                                     |
| Organisational      | Finance/accounting   | Networking                             |
| Communication       | Legal/copyright      | Business development                   |
| IT                  | Licensing            | Legal/copyright                        |
| Legal/copyright     | Sales                | Fundraising                            |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

Creative & Cultural Skills. (2010). *UK Music Skills Audit [online survey running May-July 2010]*. Creative & Cultural Skills.

Music businesses experience skills gaps due to staff lacking experience, no time for training and/or a limited budget (see Table 10). Only 3% of those surveyed in Creative & Cultural Skills' Workforce Survey thought their skills gaps were caused by the limited availability of relevant training<sup>12</sup>. As such, the issue seems to be how the music sector workforce can find the time and money for training rather than where they can access it. Managers also need to have the right information and support when they are putting together their business and HR plans, so that relevant training can form a key part of their strategic activities.

**Table 10: Reasons for experiencing skills gaps**

|                                  | Music |
|----------------------------------|-------|
| Lack of experience               | 31%   |
| Limited time for training        | 29%   |
| Limited budget for training      | 22%   |
| Difficult to keep up with change | 13%   |
| Lack of 'time served'            | 6%    |
| Limited availability of training | 3%    |
| High staff turnover              | 0%    |
| Other                            | 24%   |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

Skills gaps make it hard for a business (including the practice of sole traders and freelancers) to grow; the time and money saved by not undertaking training is lost further down the line. The most common effects of skills gaps are the loss of existing work and the need to turn away new work (see Table 11).

<sup>12</sup> Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.



Table 11: Consequences of skills gaps for the music industry

|  | Percentage of businesses |
|--|--------------------------|
| Lost business                                  | 21%                      |
| Increased workload for others                  | 1%                       |
| Delays to developing new products or services  | 0%                       |
| More work is outsourced                        | 6%                       |
| Turned away business                           | 15%                      |
| Increased operating costs                      | 1%                       |
| Difficulties introducing new working practices | 3%                       |
| Difficulties meeting quality standards         | 0%                       |
| Other  | 15%                      |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

### What kind of skills will music businesses need in the future?

Evidence shows that organisations in the sector tend not to 'think forward' in terms of the skills issues that might affect them in the future. Forty-five percent of businesses think that there are no areas where they might experience skills problems in the future (see Table 12).

Table 12: Perceived future skills needs

|                       | Music | Creative and cultural industries |
|-----------------------|-------|----------------------------------|
| Digital skills        | 7%    | 16%                              |
| ICT skills            | 7%    | 10%                              |
| Creative expertise    | 7%    | 8%                               |
| Online skills         | 5%    | 8%                               |
| Marketing skills      | 4%    | 7%                               |
| Administrative skills | 3%    | 3%                               |
| Design skills         | 2%    | 2%                               |
| Finance/Accounting    | 2%    | 2%                               |
| Customer service      | 1%    | 0%                               |
| Management            | 1%    | 2%                               |
| Fundraising           | 1%    | 2%                               |
| None                  | 45%   | 32%                              |
| Don't know            | 8%    | 11%                              |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

Evidence suggests that the top three occupational areas in employment demand are as follows<sup>13</sup>:

- Musicians (who require performance skills and, frequently, musical composition skills);
- Music producers (whose required skills may include project management, HR management and facilities management); and
- Audio-visual equipment operators (who require specialist equipment-based skills).

These are the roles that will need investment in the near future. Colleges and universities need to start planning for this need, while music businesses, sole traders and freelancers whose work relates to these areas need to invest in their own training as soon as possible.

<sup>13</sup> Creative & Cultural Skills. (2011). *Creative and Cultural Industries Occupational, Skills and Productivity Forecasting*. Creative & Cultural Skills.



# 03

## Training in the music sector





# Training in the music sector





National Skills Academy for Creative & Cultural: Train the Trainer event (see page 47).

3.1. Training habits

UK employees across all industries who undertake regular training earn on average between 5% and 6% more than those who do not undertake workplace training<sup>14</sup>, while businesses who do not invest in training during a recession are 2.5 times more likely to fail. As discussed in Section 2, training staff (or undertaking personal development if a freelancer or sole trader) is absolutely vital if a business is to stay successful.

Preferred types of training

Thirty percent of music businesses and freelancers engaged in training for themselves or their staff in 2009/10<sup>15</sup>. Informal training is the most preferred training format in the UK’s music sector (see Table 14), followed by in-house formal training. The sector is less likely to undertake external training than the rest of the creative and cultural industries.

Table 13: Preferred training mechanisms

|  | Music | Creative and cultural industries as a whole |
|--|-------|---|
| Informal training (e.g. on-site, on-the-job coaching)  | 51%   | 46%   |
| In-house formal training (delivered by your organisation to its staff)   | 26%   | 33%   |
| External training (e.g. college, university or other training providers, including professional associations and trade unions) | 21%   | 24%   |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

On-the-job coaching, networking, attending conferences, and personal knowledge development are the most common types of training undertaken in the music sector (see Table 15).

14 Department for Business, Enterprise and Regulatory Reform. (2006). *Non-certified learning and skills: incidence in the UK, variation across countries and links to productivity*. BERR.  
15 Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.



Table 14: Common types of training undertaken

|  | Music | Creative and cultural industries as a whole |
|--|-------|---|
| On-the-job coaching  | 46%   | 42%   |
| Networking   | 45%   | 41%   |
| Attending conferences                                      | 41%   | 42%   |
| Personal knowledge development e.g. reading                | 36%   | 45%   |
| Skill-based sessions delivered by an external provider     | 36%   | 30%   |
| Mentoring  | 26%   | 25%   |
| Training developed internally by your business             | 21%   | 19%   |
| Knowledge-based sessions delivered by an external provider | 19%   | 32%   |
| Industry-accredited training                               | 19%   | 18%   |
| Structured CPD based on organisational needs               | 5%    | 10%   |
| Specific Union Learning                                    | 5%    | 1%  |
| Other vocational training                                  | 4%    | 7%  |
| Graduate-level training                                    | 3%    | 6%  |
| Postgraduate level training                                | 3%    | 6%  |
| An Apprenticeship  | 2%    | 3%  |
| NVQs or SVQs   | 1%    | 4%  |
| Other  | 1%    | 5%  |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

Reasons for undertaking training

Sixty-one percent of respondents stated that their reason for undertaking training in the music sector was to develop particular skills (see Table 15). Twenty-three percent thought that the training suited a need at that particular time, while the same proportion undertook training courses because they had high levels of industry recognition. Twenty percent of training was undertaken because it presented a good networking opportunity.

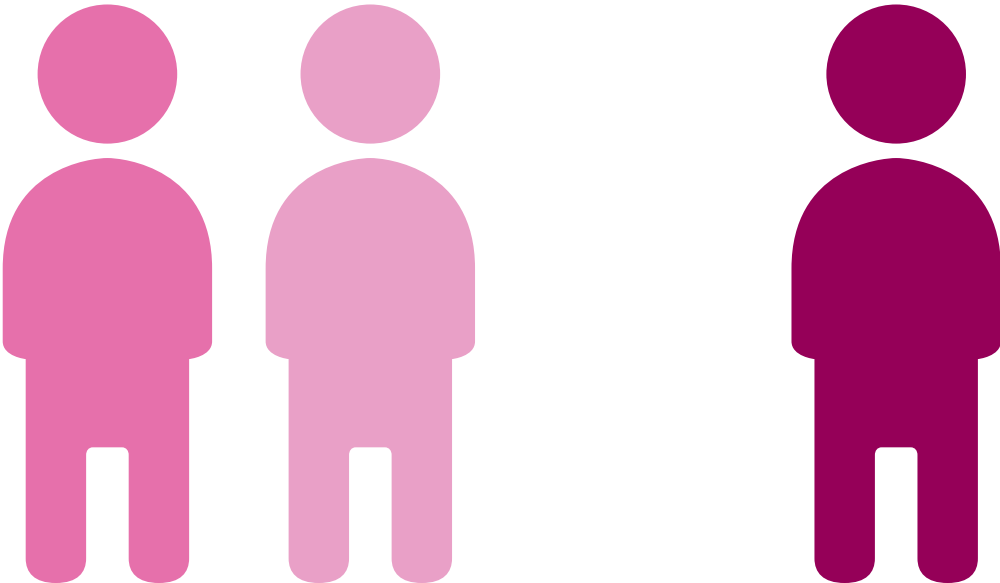




Table 15: Most commonly cited reasons for undertaking training

|  | Music | Creative and cultural industries as a whole |
|--|-------|---|
| It provided the appropriate skills for employees | 61%   | 50%   |
| It suited the need                               | 23%   | 35%   |
| Industry recognition                             | 23%   | 20%   |
| It supported growing the business                | 20%   | 17%   |
| It was a good networking opportunity             | 20%   | 13%   |
| To keep skills and knowledge up to date          | 14%   | 20%   |
| The cost suited my budget                        | 14%   | 19%   |
| Because of the accreditation gained              | 13%   | 17%   |
| Availability of courses                          | 11%   | 12%   |
| Recommendation                                   | 7%    | 18%   |
| Because I could get funding for it               | 7%    | 5%  |
| Organisational policy/statutory requirement      | 6%    | 4%  |
| Other  | 4%    | 3%  |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

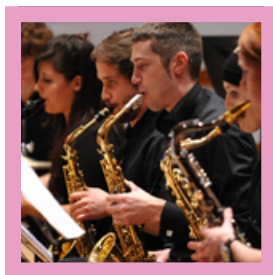
Reasons given for not accessing training included a lack of time (20% of respondents) or money (15%) – see Table 16. Sixty-six percent of those who confirmed they did not undertake training stated that this was because they or their staff were already fully proficient, which may suggest that they may not be thinking sufficiently about future skills issues.

Table 16: Most commonly cited reasons for not undertaking training

|  | Music businesses |
|--|------------------|
| Your staff are already fully proficient                        | 66%              |
| There is not enough time for training                          | 20%              |
| Your establishment lacks the funds for training                | 15%              |
| No appropriate training is available in terms of subject area  | 9%               |
| Training is not considered to be a business priority           | 6%               |
| There is a lack of cover for training                          | 4%               |
| Your staff are not keen to participate in training             | 2%               |
| No suitable training is available in terms of mode of delivery | 2%               |
| Training is available but not at the right level               | 2%               |
| Other  | 10%              |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.





Saxophone Ensemble at the Royal College of Music (RCM). Photography by Chris Christodoulou.

### 3.2. Funding for training

Fifteen percent of music businesses say that that their employees have a specific entitlement to training<sup>16</sup>, with 55% saying that their employees do not receive any training or development at all (see Table 17).

Table 17: percentage of days spent training by staff

|                   | Music | Creative and cultural industries as a whole |
|-------------------|-------|---|
| <b>0 days</b>     | 55%   | 44%   |
| <b>1-2 days</b>   | 8%    | 11%   |
| <b>3-4 days</b>   | 7%    | 9%  |
| <b>5-7 days</b>   | 10%   | 12%   |
| <b>8-10 days</b>  | 1%    | 7%  |
| <b>11-15 days</b> | 4%    | 5%  |
| <b>16-20 days</b> | 2%    | 3%  |
| <b>21-30 days</b> | 4%    | 3%  |
| <b>31-40 days</b> | 3%    | 2%  |
| <b>40+ days</b>   | 6%    | 3%  |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

The majority of the music industry (92%) has neither an internal training budget nor any record of accessing external training funding (90%)<sup>17</sup>. Three quarters (74%) said that their budget or lack of budget had not changed over the last three years, with 7% saying it had increased, 8% that it had decreased and 11% unaware of whether it had increased or decreased.

The most frequently stated reason for not increasing an organisation's training budget in the music sector was a lack of funds. Forty-five percent of businesses gave this reason compared with 30% across the creative and cultural industry in general.

Table 18: Reasons for not increasing training budgets

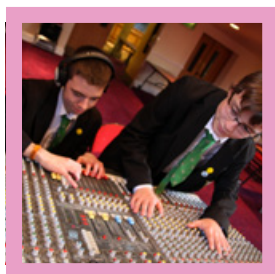
|  | Music | Creative and cultural industries as a whole |
|--|-------|---|
| <b>Lack of funds</b>                               | 45%   | 30%   |
| <b>Economic climate</b>                            | 24%   | 25%   |
| <b>Less training required</b>                      | 10%   | 29%   |
| <b>Fewer employees</b>                             | 21%   | 15%   |
| <b>Bureaucracy</b>                                 | 0%    | 2%  |
| <b>Lack of knowledge of training opportunities</b> | 10%   | 2%  |
| <b>More free training is available</b>             | 0%    | 3%  |
| <b>Not enough time for training</b>                | 0%    | 11%   |
| <b>Suitable training not available</b>             | 21%   | 5%  |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

Thirty-six percent of training in the music sector is fully funded by the employer (see Table 19). This includes freelancers funding their own skills development. Fifteen percent is funded or part-funded by the employee.

<sup>16</sup> Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

<sup>17</sup> Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.



National Skills Academy for Creative & Cultural: Offstage Choices event (see page 46).

Table 19: Funding of training in businesses

|   | Music |
|---|-------|
| Fully funded by the employer  | 36%   |
| Partly funded by the employer, with funding from another organisation | 3%    |
| Partly funded by the employer, with employee contribution             | 4%    |
| Not at all – employee funds   | 11%   |
| Not at all – funding comes from another organisation                  | 7%    |
| Don't know  | 40%   |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

Only 10% of music businesses or freelancers have accessed public funding<sup>18</sup>, the majority of them from the orchestral or live sector. Thirty-nine percent of those who have not accessed funding said that this was because they did not need it, with only 18% saying that they did not how to apply and 6% saying that they were unaware of funding being available.

Table 20: Reasons for not accessing funding

|   | Music |
|---|-------|
| Don't need funding                              | 39%   |
| Unsure how to apply                             | 18%   |
| Don't qualify                                   | 14%   |
| Not undertaking training                        | 10%   |
| Don't have time to apply                        | 8%    |
| No suitable funding available                   | 8%    |
| Unaware of funding available                    | 6%    |
| Training not available to apply for funding for | 5%    |
| Too difficult to apply                          | 3%    |
| Not applicable                                  | 2%    |
| Don't want to apply                             | 1%    |

Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

Existing funding routes will change in the coming months and years, so those businesses in the music sector that have traditionally relied on public funding will need to find new ways to fund training. This might mean more private funding, an increased reliance on trade associations' training provision, and the further development of more cost-effective training methods (such as peer mentoring).

<sup>18</sup> Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.

# 04

## Key skills challenges for the music sector





# Key skills challenges for the music sector







The data outlined in *The Music Blueprint* highlights certain key skills challenges for the UK's music sector. These include: providing the proper information, advice and guidance on careers and training opportunities to individuals and businesses alike; ensuring that formal education delivered by schools, college and universities is aligned with the needs of industry; embedding continuing professional development within each and every organisation and within freelancers' planning; and supporting those working with children and young people. These challenges are explored in detail in this section.

### Entry to the music sector and diversity

The music sector is extremely popular with those seeking a career in the creative industries. However, information, advice and guidance on the available entry routes is acknowledged by employers to be haphazard – something that resources such as Creative & Cultural Skills' Creative Choices° website ([www.creative-choices.co.uk](http://www.creative-choices.co.uk)) are seeking to address. Creative Choices° offers careers and business advice to new entrants and experienced professionals alike so that everyone has access to the information they need to get in and get on in the music sector. Widely available and easy-to-access information of this sort is particularly necessary in the context of changes to the higher education landscape.

The strong competition for job vacancies in the music sector, particularly in performance roles, means that employers can take their pick from a long list of highly-qualified individuals (42% of the music sector is qualified to Level 4 or higher – see Table 6 on page 18). Many of these new recruits hold qualifications at a higher level than is needed by the role they perform. Despite this, employers tell us that new entrants are not equipped with the right skills for working in the industry (see Table 7 on page 18).

In contrast with the oversupply of applicants to the music sector in general, the live music sector has a shortage of skilled technical workers. For both undersubscribed and oversubscribed parts of the sector, then, the traditional skills system could do more to fulfil the needs of industry. Formal qualifications appear not to be providing students with the work-related skills they will actually need to work in the sector, although they gain certain 'soft skills' such as problem-solving and communication.

There is a low diversity rate in the music sector, which could be explained by the tendency to rely on graduates (who are more likely to come from socio-economically advantaged backgrounds) for entry-level positions that do not actually require a degree. There is a proliferation of internships on offer (44% of respondents to the UK Music Skills Audit stated that they or their employer offered some form of work experience placement<sup>19</sup>), many of which are unpaid. This requires new entrants or their families to support themselves financially for long periods of time, which can mean that new entrants from underprivileged backgrounds are excluded.

19 Creative & Cultural Skills. (2010). *UK Music Skills Audit*. Creative & Cultural Skills.

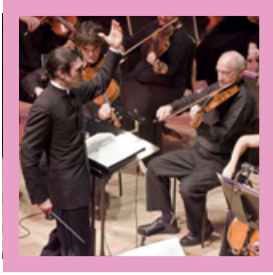


Image courtesy of the Association of British Orchestras. Photo by Joe Plommer.

By recruiting from the full talent pool on offer, businesses and freelancers alike can benefit both creatively and economically, but a shift in mindset is needed. For example, UK Music and the Alliance for Diversity in Music and Media (ADMM) are leading plans for an Equality Charter (applicable to both the existing workforce and recruitment processes) in order to establish a benchmark for employers to work to and to help to break down existing barriers.

It is important to consider alternative, accessible entry routes into the industry, such as Apprenticeships. Creative & Cultural Skills has in recent years launched new Apprenticeship pathways specific to the skills needs of the creative and cultural sectors, such as Live Events and Promotion, Music Business Marketing and Promotion, Community Arts Management, Freelance Music Practitioner and Music Business. More generic pathways such as Business Administration, Marketing, and Finance are also available for take-up by the music industry (see page 44 for more information).

There are still significant barriers to employers wishing to take on Apprentices, particularly small businesses. These include the time it takes to train an Apprentice and the cost implications of putting this time aside. We need to work together to ensure that those barriers are well articulated to Government so that they can be dealt with appropriately.

### **Industry's role in higher and further music education**

It is absolutely vital that any education or training taken by individuals pursuing a career in the music sector is relevant to the reality of the industry. While many higher and further education institutions (including colleges, specialist schools and universities) already work with local or national employers, there needs to be more widespread alignment between education and industry. Networks and bodies such as JAMES (the education arm of the Association of Professional Recording Services, the Music Producers Guild and the UK Screen Association), the Music Education Council and others can play a key role here.

Practitioners across the sector – from musicians to managers, music publishers to recording companies, producers to promoters, retailers and distributors to live venue managers and programmers, orchestral conductors to composers, and music educators to music therapists – should be encouraged to get involved in the development and delivery of courses claiming to prepare someone for a career in the sector, while educational institutions need to seek this input proactively. Further work into which mechanisms would best enable these relationships on both sides is needed to understand how the music and education sectors can work together going forward.

It is important that music courses claiming to prepare students for a career in the industry take into account the need for both musical skills across a range of genres and business skills. While many educational institutions do already offer a broader range of study, this needs to apply across the board. In particular, considering the fact that the music industry thrives on such a broad range of genres, roles, and media, there is perhaps an over-emphasis on classical performance in formal training, or at least a lack of breadth to complement this core element. This means that graduates may not have the skills they need in the job market.

While the higher and further education systems offer much good formal training, there are also many high-quality informal training opportunities on offer. However, the provision of these courses, and information on the range available, is patchy across different regions and subsectors. This means that it can be hard for individuals to access appropriate training.

Creative & Cultural Skills is working with employers from across the sector to ensure that the right vocational qualifications are on offer, are backed up by National Occupational Standards (see Section 5 for more information), and are refreshed regularly as appropriate. Meanwhile, the value of other informal training opportunities may be a flexible approach that can be changed month to month depending on the needs of this fast-changing sector. The key is to retain a range of formats, approaches and accreditation routes, but to ensure that every training opportunity provides students or trainees with the skills they need.

I see people without core communication and technical skills every day in the live music sector, especially those fresh out of education. As an industry we need to make it clear where we need better support from the education system, and to get involved in the development of qualifications. How can we expect our trainees to take a proactive approach to learning if we don't ourselves?

**Deptford John**, guitar technician, lecturer and member of the Skills Academy Live Music Expert Panel



### Continuing professional development and business support

Only 30% of the music industry surveyed for Creative & Cultural Skills' Workforce Survey had undertaken some form of training in the previous year<sup>20</sup>. This tendency not to plan continuing professional development means that many in the sector are not fulfilling their potential. In particular, employers have told us that there are skills gaps in IT, marketing, pricing, and international facilitation and promotion<sup>21</sup>. These issues are exacerbated by the current need for increased signposting of training and development opportunities.

There is also a key shortage of business development skills within the sector. For the commercial music sector this can mean that businesses and freelancers miss out on opportunities to broker contracts with the wider business world. Meanwhile, without core business skills the subsidised and live sectors can miss out on the multiple business development opportunities offered by, for example, online social networks or new ticketing processes<sup>22</sup>. These opportunities are open to all areas of the music sector, including those seen as more traditional – for example, the London Symphony Orchestra sells more recordings to the North American market through iTunes than by traditional CD distribution channels<sup>23</sup>.

<sup>20</sup> Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills.  
<sup>21</sup> Ibid., and Arts Council England and the British Council. (2010). *Supporting UK Musicians Abroad*. ACE/British Council.

<sup>22</sup> The Ticketing Institute ([www.theticketinginstitute.com](http://www.theticketinginstitute.com)), launched in November 2010, offers the live events sector information and advice on new technologies, systems, and suppliers.

<sup>23</sup> *The Times* (Life section), 8 November 2010, pp14-15.



Sparks, Royal College of Music's (RCM) Outreach & Widening Participation programme. Photography by Sheila Burnett.

In a sector where 92% of businesses employ fewer than ten people<sup>24</sup>, many individuals take on a variety of different roles outside of their area of expertise. For example, there is an increasing pattern of labels handling both the recording and the live aspect of an artist's work, which may even extend as far as music publishing, retail and/or distribution. Meanwhile, those working in the subsidised sector in particular often combine promotional and operational roles. An individual working for an orchestra or as a freelance agent, for example, might be responsible for marketing, ticketing and concert management at the same time. All these roles, though interlinked, bring with them very different skills needs. Faced with rolling deadlines, many individuals are not undertaking training in preparation for the disparate roles they fill.

Hand in hand with the need to signpost continuing professional development opportunities comes the need to point businesses and freelancers towards effective business support mechanisms. This support can range from one-to-one business coaching to online toolkits, and must be flexible, targeted, relevant and accessible. As just one example, the Association of Independent Music (AIM) is working with the London Development Agency to deliver London Connected, a two- year business support scheme offering training and mentoring to help small and medium-sized music businesses to adapt to the challenges of the digital age.

Small businesses in the music sector are especially likely to rely on personal funds and loans for their initial set-up rather than accessing external funding or using partnership models, which can pose a threat to their long-term sustainability. As such, particular emphasis needs to be placed on making sure that these businesses are able to access support that is right for them.

### **Leadership and management skills**

Within the broader need for increased uptake of continuing professional development opportunities, leadership and management skills are a particular issue. Where training does exist, it tends to be generic rather than specific to a particular industry, with the exception of a few high-quality programmes such as the UK Music Leadership Development Network, funded by the Cultural Leadership Programme. Different areas of the music sector have widely diverging leadership and management skills needs, and the training provision on offer needs to take account of this.

It also needs to be widely accessible; at present, high costs can deter those considering training in areas such as leadership. This expense, combined with the fact that leadership and management skills may not seem as immediately necessary day to day as, for example, IT skills, can lead to a 'maybe tomorrow' approach. However, poor leadership and management skills can have an enormous impact on the performance of an organisation.

<sup>24</sup> Creative & Cultural Skills (2010). *Music: Impact and Footprint 2010/2011*. Creative & Cultural Skills.



The music industry has pointed out that the wealth of applicants to a small number of vacancies in the UK's music sector has led to a 'DIY' attitude. Many of those seeking to progress in the music sector set up their own micro-businesses as a direct response to the lack of suitable roles. While this illustrates the entrepreneurial business spirit of the sector, it can mean that many employees or freelancers in the sector acquire finance, leadership and management skills in an ad hoc manner and may not be fully equipped to plan or govern strategically. Managers without the right training often 'reinvent the wheel' rather than using tried and tested management and leadership techniques.

Where leadership and management training opportunities do exist (such as those provided by professional organisations and trade associations), businesses and freelancers alike should include these in their business planning as appropriate. It is also important for industry itself to play an active role in articulating emerging training needs to training providers, so that any gaps in what is on offer can be pre-empted and addressed accordingly.

While professional orchestras have solid governance structures in place, it can sometimes be difficult to develop and retain up-to-date leadership, management and fundraising skills amongst their board and staff. This is particularly true given that many orchestral players and managers tend not to refresh and update their professional qualifications or skills. It would be good to see greater access to this kind of training, and to see a commitment to the skills agenda included in orchestras' business plans.

Mark Pemberton, Director, Association of British Orchestras (ABO)



### Digitisation, copyright and Intellectual Property (IP) issues

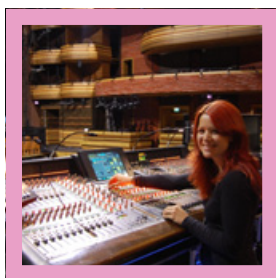
Creative & Cultural Skills' research shows that employers see the lack of ability to navigate the complex copyright and intellectual property landscape as a critical skills gap<sup>25</sup>. In particular, the responses to the UK Music Skills Audit showed that this was a worry across businesses of different sizes and types. This skills issue directly threatens businesses' and individuals' success, and will only increase as further technologies develop. Freelancers, small businesses and large corporations alike need to develop and retain high-level expertise in handling contracts and rights in the digital age. Without these skills, the music industry will not be able to meet the challenge of this new environment and deliver effective and healthy digital-adapted businesses.

The music sector has seen an enormous shift in consumer behaviour over the last decade. Digital music formats have created new ways of delivering music to consumers. The International Federation of the Phonographic Industry (IFPI) reports that this has led to a 940% rise in worldwide digital music sales between 2004 and 2009 as download stores and music streaming sites have been adopted by customers<sup>26</sup>. Services such as Spotify and iTunes, which did not exist a decade ago, have become large and successful businesses, as well as household names.

<sup>25</sup> Creative & Cultural Skills. (2009). *Creative and Cultural Industries Workforce Survey*. Creative & Cultural Skills. and Creative & Cultural Skills. (2009). *UK Music Skills Audit*. Creative & Cultural Skills.

<sup>26</sup> International Federation of the Phonographic Industry. (2010). *Digital Music Report 2010: Music how, when, where you want it*. IFPI.





A Creative Apprentice in action. Courtesy of the National Skills Academy for Creative & Cultural (see page 44).

However, digital formats have also made the unlicensed copying and sharing of recorded music easier. The total music market decreased by 30% over 2004–2009<sup>27</sup>. The market in physical products such as CDs, with all the distribution and retail structures that accompany this route to market, for example, has seen a particular downturn. On the other hand, alternative product formats have rocketed. IFPI cites the example of Beyoncé’s *I Am... Sasha Fierce* album, which is available in more than 260 different products in the US, including music videos, mastertones, ringback tones and audio tracks<sup>28</sup>.

In the UK, the Digital Economy Act 2010 placed responsibility for illegal downloads with content industries, internet service providers and users alike, but many companies and trade associations are still calling for more extensive licensing structures to be put in place. Further developments in this area will increase the need for the right skills to be built up throughout the music sector.

The commercial music industry in the UK is a sophisticated and complex sector, which operates in a very fast-changing digital market. At UK Music we have a vision to grow our industry to challenge the United States as the largest music-producing nation in the world. Fulfilling this vision will require our workforce to have the right skills, and we must develop those now.

Remi Harris, Director of Operations, UK Music



## Working with children and young people

Music educators make up a significant portion of the UK’s music sector. Music Manifesto’s *Making Every Child’s Music Matter* report states that there are 10,700 musicians working in local authorities and independent music services in England alone<sup>29</sup>. Many more musicians undertake private teaching or community work.

Practitioners working with children and young people (such as musicians, workshop leaders and music therapists) are faced with specific skills needs over and above their normal practice. A music professional in this context needs to be able to adhere to stringent safeguarding legislation, work in conjunction with the national or school-specific curriculum, and skilfully introduce the child or a group of children to both music theory and a range of genres and instruments (the study of which may never have featured in their formal instrumental training). Presentation, facilitation and communication skills are paramount, as are counselling techniques in certain settings. Where these skills are missing or underdeveloped, music leaders can sometimes find a disconnect between themselves and those they seek to engage.

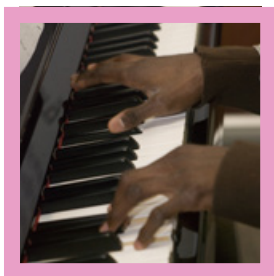
Those working with children and young people need support and guidance in developing the full range of skills required. In particular, it is vital to take account of music educators’ and music leaders’ need for flexible, easily accessible training across a whole range of formats (including distance and online training).

<sup>27</sup> Ibid.

<sup>28</sup> Ibid.

<sup>29</sup> Music Manifesto. (2006). *Making every child’s music matter: Music Manifesto Report Number 2 – A consultation for action*. Music Manifesto. The figure of 10,700 individuals working in music education given by Music Manifesto is higher than Creative & Cultural Skills’ figure of 6,970 (given on page 16) as it takes into account those whose main activity is in another subsector but who also undertake teaching activities.





Keyboard Player. Courtesy of the Incorporated Society of Musicians (ISM). Photography by Mark Thompson

From 2012 the Department for Education is taking on the functions of the Children's Workforce Development Council in order to address the needs of professionals working in educational settings. Creative & Cultural Skills will be monitoring this activity with a view to how it impacts upon those working with children and young people in the creative and cultural industries, as well as working to ensure that these individuals have access to the right training.

The music sector itself has also taken the lead in starting to cater for some of the training needs of those working with children and young people. For example, the Musicians' Union, the National Society for the Prevention of Cruelty to Children (NSPCC), Music Leader and the Associated Board of the Royal Schools of Music (ABRSM) have together created a short, online, modular course called Child Protection Awareness in Music<sup>30</sup>. The Musicians' Union are also working with the online teacher database [www.musicteachers.co.uk](http://www.musicteachers.co.uk) to kitemark teachers who have undertaken this course. Meanwhile, as there are so many different settings to work in and so many different approaches to the work, a group of sector representatives (including Youth Music, the Paul Hamlyn Foundation, the Musicians' Union, Trinity, and the Sage Gateshead) are campaigning for a universal Code of Practice for musicians working with children and young people.

There is potential scope for further activity to support music professionals working with children and young people. At present, the quality, depth, and regional distribution of the training and qualifications on offer can differ widely, and there is no way to accredit previous experience. In a 2010 audit of training available to creative professionals working with children and young people<sup>31</sup>, 93% of survey respondents stated that they found training in this area useful. However, only 5% said that they thought the current offer was adequate, and 52% would like to see some sort of nationally recognised training offer – as long as it was flexible enough to take into account the needs of those with portfolio careers.

An example of one way forward could be a suite of accredited qualifications for creative practitioners working with children and young people covering multiple aspects of the role, in order to quality assure their work. The existence of a clear standard would help schools and other employers of creative practitioners in this area to recognise and recruit those with the necessary skills, particularly in areas related to safeguarding and health and safety.

Working with groups of children and young people forms part of many music professionals' portfolio careers, and demands a wide range of skills. It's really important that all have access to relevant training, and that schools and other employers are able to recognise those with the right skills and knowledge. This would ensure that both students and music professionals are able to get the best out of their music learning and teaching experiences.

**Tina Redford**, Head of MusicLeader North West



<sup>30</sup> See <http://platinum.educare.co.uk/music> for course details and [www.youtube.com/user/TheMusiciansUnion](http://www.youtube.com/user/TheMusiciansUnion) to view videos accompanying the course.

<sup>31</sup> Creative & Cultural Skills. (2010). *An audit of training available for artists working with children and young people*. Creative & Cultural Skills.

# 05

## Next steps



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# Next steps





Tom Ellis, Guitarist, at the Royal College of Music (RCM). Photography by Chris Christodoulou.

*The Music Blueprint* is designed to provide key research data on the demographic profile, skills levels and training needs of the music sector in the UK. As shown in Section 4, this research has highlighted certain key issues that urgently need addressing. We hope to use this research as the basis from which to work with the breadth of the sector to address the skills issues outlined here.

Networks and organisations such as UK Music, the Association of British Orchestras, the Music Education Council, JAMES, the Skills Academy, the National Music Council and many others bring together representatives from various subsectors to address their shared skills and advocacy needs. However, in an environment fraught with economic and legislative challenges, the sector needs to continue its joint advocacy work more broadly, backed up with the right evidence and research. This joint working could come in many different forms, and should include policy makers, local authorities, industry, education and other sectors.

In the following pages, we outline what Creative & Cultural Skills and the Skills Academy are doing to support the music workforce so that it can continue to play a key role in the global music industry. It is also vital that individuals and employers throughout the UK develop and champion skills in the music sector. Together we can ensure that the UK's music sector, from orchestras to recording companies, from music publishers to collecting societies, and from performers and venues to music educators, gets the right skills at the right time to guarantee global success.

Please contact us on [engagement@ccskills.org.uk](mailto:engagement@ccskills.org.uk) if you or your organisation would be interested in addressing the skills issues outlined in *The Music Blueprint*.

## **Creative & Cultural Skills across the UK**

### **Creative Choices: careers advice and guidance**

Creative Choices<sup>o</sup> ([www.creative-choices.co.uk](http://www.creative-choices.co.uk)) provides and signposts information, relevant tools and support for potential and current employees and employers in the creative and cultural industries.

### **Qualifications and National Occupational Standards**

Creative & Cultural Skills works with stakeholders in education, industry and Government to ensure that the content of vocational qualifications equips music students with the skills they need in the job market. Our Sector Qualifications Strategy presents employers' needs following in-depth consultation on a biannual basis and directs Government funding to where it is most needed.

We also work with industry representatives to produce National Occupational Standards. These provide a clear description of what you need to know and what you need to be able to do to perform a job successfully. Employers can use National Occupational Standards to create job descriptions, develop staff training courses and support the appraisal process. Educationalists use National Occupational Standards to develop qualifications to support the skills needs of those in the workplace.



Historically, very few National Occupational Standards existed for the creative and cultural sectors. However, Creative & Cultural Skills is working to change this by creating thorough new sets of National Occupational Standards for the sector to use, developed after extensive consultation with people working and teaching in the sector. So far, we have created National Occupational Standards in the following areas relevant to the music industry:

- Community Arts
- Cultural Venue Operations
- Freelancing in the Creative and Cultural Industries
- Live Events & Promotions
- Music Business (Collecting Societies)
- Music Business (Publishing)
- Music Business (Record Labels)

### **Internship Guidelines**

Building on those developed with Skillset, Creative & Cultural Skills and Arts Council England are working on a set of guidelines for employers offering internships, due to be published in summer 2011. Many employers in the creative and cultural industries find the law surrounding internships confusing. These guidelines seek to clarify what an internship is, detail an employer's obligations, and provide advice on how to run a good internship scheme.

### **Apprenticeships**

Apprenticeships offer a non-graduate entry route into the music industry, offering on-the-job skills and experience. In 2008 there were no Apprentices on accredited courses within the creative and cultural industries. Today there are 500 across the UK who are currently enrolled on, or have completed, an Apprenticeship.

Music businesses are able to take on Apprentices in a number of relevant pathways, such as:

#### **Level 2 Apprenticeship**

Music Business Marketing and Promotion  
Cultural Venue Operations Support  
Live Events and Promotion Support  
Community Arts Administration

#### **Level 3 Advanced Apprenticeship**

Community Arts Management  
Live Events and Promotion  
Cultural Venue Operations  
Freelance Music Practitioner  
Music Business

See [www.ccskills.org.uk](http://www.ccskills.org.uk) for more information on how to take on an Apprentice in your business.



## National Skills Groups

We regularly consult employers and representative bodies across the whole range of occupations Creative & Cultural Skills covers. We also have two key Employer Skills Groups based in Scotland and Northern Ireland, with the Scotland Employers Skills Group led by John Stalker, General Manager of the Festival City Theatres Trust, and the Northern Ireland Employers Skills Group led by Roisin McDonough, Director of Arts Council Northern Ireland. In Wales we have established a new Wales Advisory Committee led by Stuart Neale of Fforwm Crefft Cymru (Craft Forum Wales).

## The National Skills Academy for Creative & Cultural

### World-class training for the world's greatest stages

The National Skills Academy for Creative & Cultural operates as a membership organisation, directed by a diverse membership of employers and training providers. Together, the network of members are working to recognise, develop and improve the skills needed to be successful within the technical theatre and live music industries.

The membership network is made up of over 230 industry members and of 20 Founder Further Education Colleges across England selected by the Skills Academy Board based on an excellent track record in teaching and learning in the performing and visual arts, geographical reach, and an ability and willingness to engage with cultural sector employers.

Our industry members include Live Nation, Midlands Off-Stage Consortium, National Arenas Association, Academy Music Group, Aldeburgh Music, and Festival Republic. You can find a complete list of members on the Skills Academy website ([www.nsa-ccskills.co.uk](http://www.nsa-ccskills.co.uk)).

### Why is the National Skills Academy for Creative & Cultural needed?

Research carried out by Creative & Cultural Skills in 2008 identified that by 2017 there would be a need for 30,000 skilled backstage, offstage and technical theatre workers, with a forecast shortage of 6,000<sup>32</sup>.

The Skills Academy has been set up to help plug the skills gap and raise awareness of the job roles available backstage and offstage. The Skills Academy also supports those already in the industry to identify the training and continuing professional development opportunities necessary to keep skills current and competitive in this current climate.

I'm involved with the Skills Academy because, as one of the largest employers in live music, it behoves me representing Live Nation to do what I can to lead by example. My involvement with the Skills Academy has opened my eyes to the lack of cohesive training and standards across our industry and the distinct lack of engagement with educators at all levels. We can help to make changes for the better, for all our existing employees and those who may consider entering our business in the future. I look forward to welcoming a new apprenticeship scheme throughout the strands of my business.

**Paul Latham**, Chief Operating officer, Live Nation



<sup>32</sup> Creative & Cultural Skills and TBR. (2007). *NSA Projections*. Creative & Cultural Skills.



Royal College of Music (RCM)  
Piano Festival. Photography by  
Chris Christodoulou.

## **The strength of the Skills Academy for Creative & Cultural is in its membership network.**

### **How is the National Skills Academy for Creative & Cultural supporting the needs of the sector?**

#### **Offstage Choices**

In 2009 the Skills Academy launched Offstage Choices – events for Year 9 & 10 students to experience first-hand the job roles and skills required to work backstage and offstage.

Although young people know about jobs in the public eye, like performing, there's little understanding of most other job roles in the sector. At our Offstage Choices events, young people take part in practical, hands-on workshops giving them a flavour of the jobs available. Member venues deliver the events and the whole careers experience, highlighting the jobs available in theatre and music focusing on backstage, technical and administrative roles.

#### **Online resources**

Getintolivemusic (available at [www.nsa-ccskills.org.uk](http://www.nsa-ccskills.org.uk)) is an online resource designed to give individuals advice and guidance around the roles available offstage and backstage. An industry panel of practitioners offers advice, answers questions, and supports individuals as they start out on their career.

#### **Production Days**

Offering exclusive backstage access for Skills Academy Founder College students to experience how production crews prepare and set up for live shows.

Students have been given access to some of Britain's best live music venues and production crews supporting Arcade Fire, Biffy Clyro, Paloma Faith, Gorillaz, Vampire Weekend and The Pogues.

#### **The Apprenticeship Training Service**

In September 2009 the National Skills Academy for Creative & Cultural was successful in its bid to set up the first national creative and cultural Apprenticeship Training Service (ATS) with start-up funding from the Skills Funding Agency.

The ATS offers employers two easy steps to taking on apprentices. The Skills Academy can now offer employers the chance to take on Apprentices in both creative pathways (our original Creative Apprenticeships) and in IT, Business and administration, marketing and finance – to name but a few options.



Image courtesy of the Association of British Orchestras. Photo by Timothy Kraemer.

### Continuing Professional Development (CPD)

Once your career is underway, we want to ensure that your skills are up to date and relevant to the changing industry.

The Skills Academy's Continuing Professional Development framework provides a central place where members can find out about and access training provision, and understand how such training meets national occupational standards.

The National Skills Academy for Creative & Cultural is involved with PLASA (the Professional Lighting and Sound Association) and each year runs sessions at their Leeds and Earls Court Events looking at key issues within the industry and education.

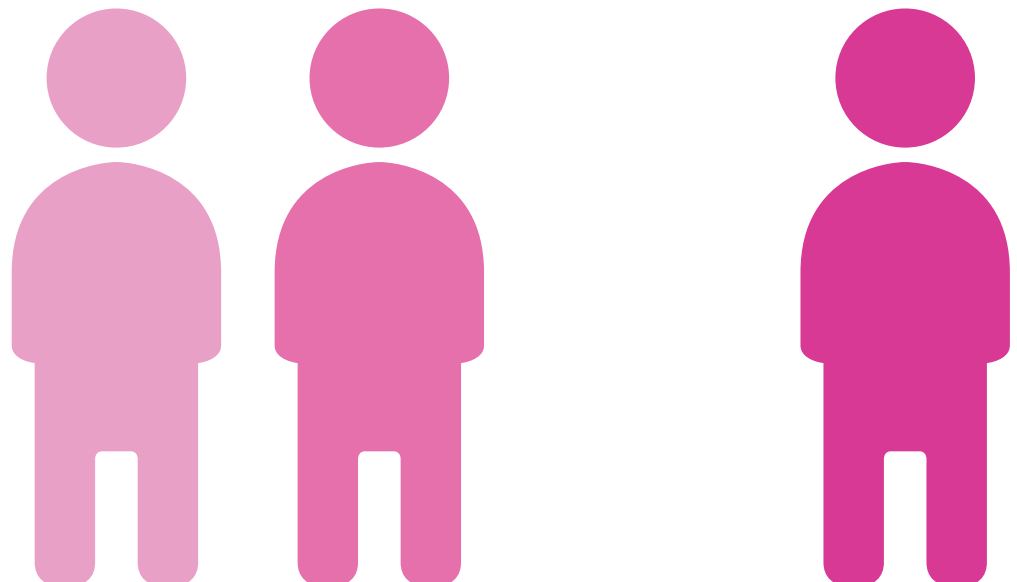
The Skills Academy also runs 'Train the Trainer' workshops to support industry members delivering the Offstage Choices events. These practical sessions are designed to help members deliver workshops.

### Master classes

The Skills Academy will be launching Master Classes through which senior technical practitioners can discuss and demonstrate their skills, working with groups of industry professionals (employees, freelancers or casual workers) and senior students drawn from their Founder College network.

Traditionally, the master class format is based on performance, but many offstage experts will be able to offer an interesting and challenging experience for their audience. The Skills Academy has also embarked upon an audit of in-house training of its Industry Members to inform this and other Skills Academy programmes.

To find out more about the National Skills Academy for Creative & Cultural or to become a member visit [www.nsa-ccskills.co.uk](http://www.nsa-ccskills.co.uk).



# 06

## References and further reading





# References and further reading





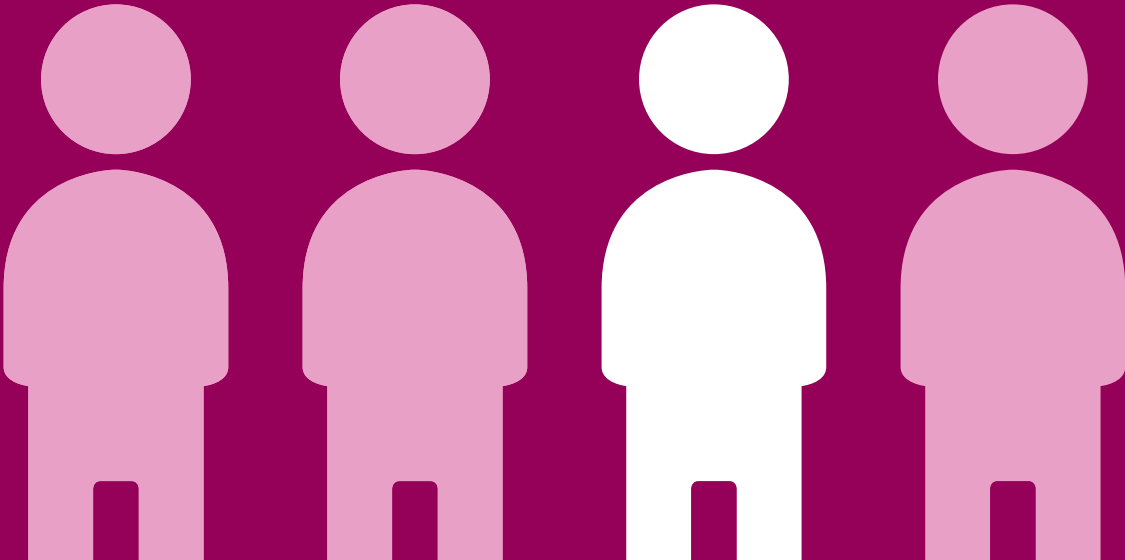
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# 07

## Useful links

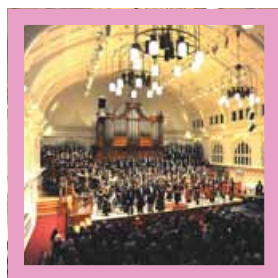


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# Useful links





Royal College of Music (RCM) Symphony Orchestra and Chorus in performance. Photography by Chris Christodoulou.

Alliance of Sector Skills Councils  
[www.sscalliance.org](http://www.sscalliance.org)

Arts & Business  
[www.artsandbusiness.org.uk](http://www.artsandbusiness.org.uk)

Arts Council England  
[www.artscouncil.org.uk](http://www.artscouncil.org.uk)

Arts Council of Northern Ireland  
[www.artscouncil-ni.org](http://www.artscouncil-ni.org)

Arts Council of Wales (Cyngor Celfyddydau Cymru)  
[www.artswales.org](http://www.artswales.org)

Artsmark  
[www.artsmark.co.uk](http://www.artsmark.co.uk)

Associated Board of the Royal Schools of Music (ABRSM)  
[www.abrsm.org](http://www.abrsm.org)

Association of British Orchestras  
[www.abo.org.uk](http://www.abo.org.uk)

Association of Independent Music (AIM)  
[www.musicindie.com](http://www.musicindie.com)

Association of Professional Recording Services (APRS)  
[www.aprs.co.uk](http://www.aprs.co.uk)

The British Academy of Songwriters, Composers and Authors (BASCA)  
[www.basca.org.uk](http://www.basca.org.uk)

BECTU – The Media and Entertainment Union  
[www.bectu.org.uk](http://www.bectu.org.uk)

Business Link  
[www.businesslink.gov.uk](http://www.businesslink.gov.uk)

Clore Leadership Programme  
[www.cloreladership.org](http://www.cloreladership.org)

Community Arts Forum (Northern Ireland)  
[www.caf.ie](http://www.caf.ie)

Creative Choices<sup>o</sup>  
[www.creative-choices.co.uk](http://www.creative-choices.co.uk)

Creative & Cultural Skills  
[www.ccskills.org.uk](http://www.ccskills.org.uk)

Creative People  
[www.creativepeople.org.uk](http://www.creativepeople.org.uk)

Creative Scotland  
[www.creativescotland.org.uk](http://www.creativescotland.org.uk)

Cultural Enterprise Office  
[www.culturalenterpriseoffice.co.uk](http://www.culturalenterpriseoffice.co.uk)

Cultural Leadership Programme  
[www.culturalleadership.org.uk](http://www.culturalleadership.org.uk)

Department for Business, Innovation & Skills (BIS)  
[www.bis.gov.uk](http://www.bis.gov.uk)

Department for Culture, Media and Sport (DCMS)  
[www.dcms.gov.uk](http://www.dcms.gov.uk)

Department for Culture, Arts and Leisure, Northern Ireland  
[www.dcalni.gov.uk](http://www.dcalni.gov.uk)

Department for Employment and Learning, Northern Ireland  
[www.delni.gov.uk](http://www.delni.gov.uk)

National Council for Graduate Entrepreneurship  
[www.ncge.com](http://www.ncge.com)

Future Jobs Fund  
[www.dwp.gov.uk/futurejobsfund](http://www.dwp.gov.uk/futurejobsfund)

Higher Education Funding Council for England  
[www.hefce.ac.uk](http://www.hefce.ac.uk)

Higher Education Funding Council Wales  
[www.hefcw.ac.uk](http://www.hefcw.ac.uk)

Incorporated Society of Musicians  
[www.ism.org](http://www.ism.org)





Pianist at the Royal College of Music (RCM). Photography by Chris Christodoulou.

Independent Review  
of Higher Education  
& Student Finance  
[hereview.independent.gov.uk/hereview](http://hereview.independent.gov.uk/hereview)

Investors in People  
[www.investorsinpeople.co.uk](http://www.investorsinpeople.co.uk)

JAMES (Joint Audio Media  
Education Services)  
[www.jamesonline.org.uk](http://www.jamesonline.org.uk)

Leadership and  
Management Wales  
[www.lmw.org.uk](http://www.lmw.org.uk)

Music Leader  
[www.musicleader.net](http://www.musicleader.net)

Music Producers Guild  
(MPG)  
[www.mpg.org.uk](http://www.mpg.org.uk)

Music Publishers  
Association (MPA)  
[www.mpaonline.org.uk](http://www.mpaonline.org.uk)

The Musicians' Union  
[www.musiciansunion.org.uk](http://www.musiciansunion.org.uk)

National Arts Learning  
Network  
[www.naln.ac.uk](http://www.naln.ac.uk)

National Association of  
Music Educators (NAME)  
[www.name.org.uk](http://www.name.org.uk)

National Endowment for  
Science, Technology and  
the Arts (NESTA)  
[www.nesta.org.uk](http://www.nesta.org.uk)

National Skills Academy  
for Creative & Cultural  
[www.nsa-ccskills.co.uk](http://www.nsa-ccskills.co.uk)

Qualifications and  
Curriculum Development  
Agency (QCDA)  
[www.qcda.gov.uk](http://www.qcda.gov.uk)

Scottish Enterprise  
[www.scottish-enterprise.com](http://www.scottish-enterprise.com)

Scottish Funding Council  
[www.sfc.ac.uk](http://www.sfc.ac.uk)

Scottish Government  
(Riaghaltas na h-Alba) –  
Arts, Culture & Sport  
[www.scotland.gov.uk/Topics/ArtsCultureSport](http://www.scotland.gov.uk/Topics/ArtsCultureSport)

Scottish Qualifications  
Authority  
[www.sqa.org.uk](http://www.sqa.org.uk)

Skills Funding Agency  
[www.skillsfundingagency.bis.gov.uk](http://www.skillsfundingagency.bis.gov.uk)

Training and Development  
Agency for Schools (TDA)  
[www.tda.gov.uk](http://www.tda.gov.uk)

UK Commission for  
Employment and Skills  
[www.ukces.org.uk](http://www.ukces.org.uk)

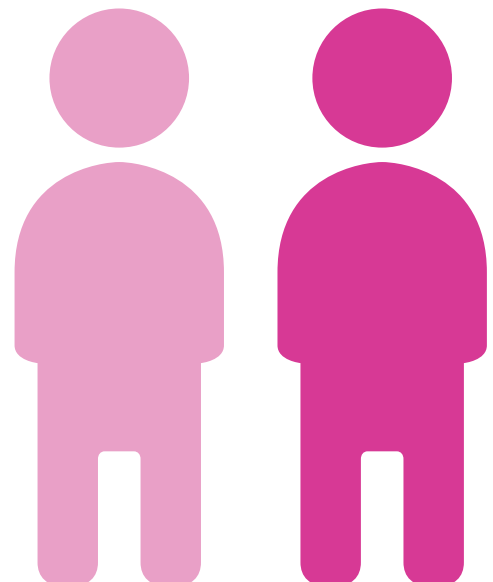
UK Music  
[www.ukmusic.org](http://www.ukmusic.org)

UK Trade & Investment  
[www.uktradeinvest.gov.uk](http://www.uktradeinvest.gov.uk)

Welsh Assembly  
Government (Llywodraeth  
Cynulliad Cymru) –  
Culture and Sport  
[www.wales.gov.uk/topics/cultureandsport](http://www.wales.gov.uk/topics/cultureandsport)

Welsh Music Foundation  
[www.welshmusicfoundation.com](http://www.welshmusicfoundation.com)

Youth Music  
[www.youthmusic.org.uk](http://www.youthmusic.org.uk)





## Creative & Cultural Skills

[www.ccskills.org.uk](http://www.ccskills.org.uk)

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