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.


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
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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
01
Introduction
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.
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\(^1\). 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.

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), 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
Profile of the music sector
Section 02
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 collected².

- 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.

² 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
- 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.

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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), 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; 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

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


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.

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4 At the time of data collection; see Section 1: Methodology.
5 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=284 for more information.
Table 2: Music employment figures\(^6\)

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


Who works in the music sector?

Table 3: Profile of music sector employees

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


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.

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\(^6\) 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.