

February 2018

House of Commons DCMS Select Committee

Inquiry into the Social Impact of Participation in Culture and Sport

1. UK Music is the umbrella body representing the collective interests of the UK's commercial music industry, from songwriters and composers to artists and musicians, studio producers, music managers, music publishers, major and independent record labels, music licensing companies and the live music sector.
2. UK Music exists to represent the UK's commercial music sector, to drive economic growth and promote the benefits of music to British society. A full list of UK Music members can be found in annex.

General

3. UK Music welcomes the opportunity to respond to the House of Commons DCMS Select Committee inquiry into the social impact of participation in culture and sport.
4. The UK is a world leading music industry. The sector contributed £4.4 billion to the economy in 2016, growing by 6% over the past years.¹ The UK is the home to diverse and innovative music companies and creators that support this growth. Their endeavours form part of a dynamic ecosystem that is consistently delivering for music fans and consumers. The music industry generates exports of £2.5 billion and employs 142,208 people.²
5. The UK creative industries also lead the world in terms of soft power. The reach and volume of our national cultural output supports our strength in soft power. According to The Soft Power 30, the UK is second to the US in terms of cultural soft power.³
6. Participation in music can have a profound impact on society as a whole. Not only does it help support our talent pipeline but it is also contributes to diversity, crime reduction and health.

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<http://www.ukmusic.org/research/measuring-music-2017>

2

<http://www.ukmusic.org/research/measuring-music-2017>

3

http://www.comres.co.uk/wp-content/uploads/2015/07/Report_Final-published.pdf

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7. We set out in our response a number of areas which should support cultural participation in music further.

Talent Pipeline

8. Britain's home grown talent is second to none. From Ed Sheeran to Adele, British artists make a massive contribution. According to the latest statistics released by Pollstar, five UK artists made the top ten worldwide tours.⁴ Tracks from Ed Sheeran's third album ÷ (Divide) have been streamed over a billion times in the US in 2017. The same album debuted at number one in nine EU countries. Human by Rag'n'Bone Man topped the charts in 11 countries. Artists such as Stormzy and Skepta are also breaking through into new international markets.
9. In order for this global impact to continue, we need to constantly be looking to where the stars of the future will come from and how they will be able to grow and develop. To achieve this we recommend particular attention is given to developing the UK talent pipeline.
10. We must strengthen opportunities to develop new artistic and creative talent, irrespective of background. In light of this, it is important to collaborate across the industry on a range of initiatives including the Government's industrial strategy and future creative sector deal, public investment in the arts – including partnership with the music industry to support talent development in contemporary popular music⁵, music education, access to instruments and rehearsal spaces, taxation and developing proposals for further fiscal incentives.
11. The music industry talent pipeline can be supported in a number of ways, including:-

- (i) Music Education

Creative skills, including music, need to begin at primary school and play a significant part in continued curriculum learning. Music provision in schools is under threat however. It has been reported that music is only compulsory for “all Year 9 students” in 62%⁶ of schools, despite it being compulsory in the National Curriculum. In addition, music GCSE uptake has seen a decrease of 8 per cent. This trend needs to be reversed to avoid a catastrophic effect on the industry in the short, medium and long term.

Reducing access to music could lead to an inequality of opportunity. Top earners are four times more likely to pay for social-enrichment classes for their children. 50% of children at independent schools receive sustained music tuition, whilst the figure for state schools is only 15%. Given its importance to developing our future workforce, compulsory creative learning needs to continue.

- (ii) Apprenticeships

⁴ Coldplay, Depeche Mode, Sir Paul McCartney, Ed Sheeran and the Rolling Stones
https://www.pollstar.com/Chart/2018/01/2017YearEndTop100WorldwideTours_621.pdf

⁵ PRS Foundation's Momentum Music Fund provides career-boosting grants to independent artists at a crucial tipping point in their career. For every £1 granted by Momentum, artists have returned £7.46 to the UK music industry http://prsfoundation.com/wp-content/uploads/2015/12/Momentum-Music-Fund-2017_FINAL_no-crop_small.pdf

⁶ <http://www.sussex.ac.uk/broadcast/read/39525>

The UK music industry is committed to helping talented young people get paid jobs in the sector. The creation of music apprenticeships have coincided with a growth in the music industry's workforce. The sector sustains 142,208 jobs, increasing by 19% in the previous year. A further 47,000 jobs supported by music tourism. UK Music has also developed a Code of Practice on internships.⁷ The Government should strengthen careers advice so that information on working in the music industry can be better understood.

(iii) Rehearsal spaces

UK Music's rehearsal spaces are now firmly embedded in their local communities and have been used to deliver meaningful projects for young people from poor socio-economic backgrounds, boosting skills, fostering creativity and driving down crime in local communities. UK Music recommends that the Government should consider further investment in the current scheme and assistance with expanding it.

Diversity

12. Recognising the need to understand how representative the music industry is, the UK Music Diversity Taskforce conducted an industry workforce survey. This found that 15.6% of the workforce are from a BAME (Black, Asian, minority ethnic) background. Whilst this is higher than the percentage for the UK population, two thirds of music industry workers are based in London where the workforce across all sectors is 30.3% BAME. The proportion of BAME workers in senior positions decreases by age. The survey found that 23.7% of BAME workers aged 25-34 are in senior roles, while between the ages of 35 and 44 the figure is 11.7% and from 45 to 64, the figures sits at 7.6%. Regarding gender, the overall split of men to women (53.6% to 45.3%) in the music industry shows women are slightly underrepresented in comparison with the UK population (49.3% to 50.7%). However, between the ages of 25 and 34, women account for 54.5% of the workforce which looks more positive for younger women in the industry. This number drops to 41.4% in the 35 to 44 age range and to 32.7% between 45 and 64.⁸
13. Further recommendations to increase industry diversity have been developed.⁹ Ensuring a diverse sector and taking steps to integrate this within the Government's industrial strategy should be taken forward. Music and other UK creative industries are successful because of their diversity. This must be remembered for our future strength.

Crime reduction

14. Over the past decade the number of children in custody has dropped by 64% to its lowest level on record, according to interim findings of a review into the youth justice system commissioned by the Ministry of Justice. While this is great news, it has to be noted that reoffending rates among young offenders have actually risen. With this in mind, it is vital that music-based rehabilitation projects are given priority because of the great things they can achieve. Music can play a key role in crime reduction and the rehabilitation of those in custody.
15. A 2014 report into Musical Pathways¹⁰, a Big Lottery-funded project which assessed the impact of music on young offenders, concluded that music can engage hard-to-reach

⁷ <https://www.ukmusic.org/skills-academy/internship-code-of-practice/>

⁸ <http://www.ukmusic.org/equality-diversity/uk-music-diversity-taskforce-workforce-diversity-survey-2016/>

⁹ <https://www.ukmusic.org/equality-diversity/recommendations/>

¹⁰ <http://www.musictank.co.uk/blog/musical-pathways-the-impact-of-music-making-opportunities-on-young-offenders/>

young people and help them cope. Most participants said their musical experiences helped them to communicate and express themselves.

16. A recent review of education in prison by Dame Sally Coates also recognised that prisoners who have had difficulties with traditional classroom subjects or struggle with self-esteem could often engage positively with the arts. Art, drama and music courses are not however a core part of the current OLASS (Offenders' Learning and Skills Service) framework. We strongly believe this is something which needs to change.

Health

17. Music performs a vital function to improving health and wellbeing and the Government should ensure that this can be developed further. Nordoff Robbins is a charity to support music therapy to change the lives of vulnerable and isolated people across the UK.¹¹ A number of other initiatives from organisations such as Help Musicians exist to support the health, both mental and physical, of those working in the music industry.

Annex

UK Music's membership comprises of:-

- AIM – The Association of Independent Music – the trade body for the independent music community, representing over 850 small and medium sized independent record labels and associated music businesses.
- BASCA - British Academy of Songwriters, Composers and Authors – BASCA is the membership association for music writers and exists to support and protect the professional interests of songwriters, lyricists and composers of all genres of music and to celebrate and encourage excellence in British music writing.
- BPI - the trade body of the recorded music industry representing 3 major record labels and over 300 independent record labels.
- FAC – The Featured Artists Coalition represents and promotes the interests of featured recording artists in the music industry.
- MMF – Music Managers Forum - representing over 500 UK managers of artists, songwriters and producers across the music industry with global businesses.
- MPG - Music Producers Guild - representing and promoting the interests of all those involved in the production of recorded music – including producers, engineers, mixers, remixer, programmers and mastering engineers.
- MPA - Music Publishers Association - with 260 major and independent music publishers in membership, representing close to 4,000 catalogues across all genres of music.
- Musicians' Union representing 30,000 musicians.
- PPL is the music licensing company which works on behalf of over 90,000 record companies and performers to license recorded music played in public (at pubs, nightclubs,

¹¹ <https://www.nordoff-robbins.org.uk/>

restaurants, shops, offices and many other business types) and broadcast (TV and radio) in the UK.

- *PRS for Music* is responsible for the collective licensing of rights in the musical works of 114,000 composers, songwriters and publishers and an international repertoire of 10 million songs.
- UK Live Music Group, representing the main trade associations and representative bodies of the live music sector

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