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The economic value of informal music-making in London

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Declaration

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1. Executive Summary

London's music industry contributes over £1 billion a year to the UK economy. It is dominated by small and medium enterprises with little public subsidy employing over 55,000 Londoners. Much of its commercial success is due to the relatively unknown enthusiasts who play music week in, week out who may gradually move up the scale to professional work. There exists little data as to where such informal music happens or how the economy of informal music education is supported.

Londoners spend around £128 million annually on musical instruments and about a quarter play a musical instrument while an additional third want to play. Music education has had relatively little to do with the development of the majority of these musicians despite changes in the school music curriculum. Voluntary musicians can access the same commercially-run music rehearsal rooms as professional musicians which play a critical part in the music industry's economic and cultural production cycle.

A focus group was set up to determine a consensus definition of informal music-making and its related settings. While there was little agreement nearly a third agreed informal music can occur with minimal adult supervision. Informal music-making with children and young people has little direct economic value. Instead, a focus was made on adult activity when musicians organise themselves to pay to hire a commercially-run rehearsal space. To come closer to quantifying the economic value of informal group music-making in the public realm in London, data was collected on the turnovers and employment levels of commercial rehearsal rooms in London.

London's music rehearsal organisations took part in a telephone survey. There exist 47 music rehearsal organisations totalling nearly 200 individual rehearsal rooms in London. Over three quarters are located in Inner London and nearly a third in the three highest deprived boroughs in England. An annual footfall was estimated at 380,000 supported by an annual economy of £9.3m. A new music rehearsal organisation opens on average every eight months while the whole sector in London supports 119 full-time employees and 104 part-time employees.

Music rehearsal organisations' economic significance goes unnoticed, and beyond most teenagers' pockets. Nonetheless they can offer useful meeting places where amateurs and professionals can exchange ideas and practice with potentially far reaching social, economic and artistic benefits. Trends are already showing that in the coming decades more money will be spent by those over 40 on leisure and recreation where music-making will come to play a huge role. The paper asks should a framework be put in place to ensure that as many people as possible have the chance to enjoy and absorb music-making.

Trevor Mason

The economic value of informal music-making in London

(16,787 words)

[music] speaks to human beings' profoundest impulses; more than words, it is the very language of the brain, the seat of intellect, emotion and the control of physical behaviour

Anthony Everitt, 1997, p. 31

2. Introduction

The UK is the third largest market in the world for sales of music and is second only to the USA as a source of repertoire. It is estimated Britain accounts for as much as 15% of the global music market and is characterised by small and medium-sized enterprises (SMEs) whose success has been founded on talent it has produced over the last 40 years¹. In 2004, Britain's music industry generated 130,000 jobs, and contributed nearly £5 billion to the UK economy². In 2001, *Cultural Trends* found London's music industry contributes over £1 billion a year to the UK economy³. There is, however, little evidence as to how music education generates a direct net economic contribution to the non-subsidised music industry.

Laing and York (2001) found the annual public sector spend on music in London was £94.9 million (in 2000-2001). Dave Laing, talking about the spread of public funding said at the time: "At present almost all the available government subsidy [90%] goes to classical music. I'd like to see a larger audience enjoying that... Current, historically-determined spending patterns are unduly restrictive. From both a business and an audience development point of view it seems clear that investment could be both fairer and more effective."

Self-supporting popular music genres and SMEs dominate the music industry with little public subsidy (see Dane et al). Lucy Green's detailed phenomenological study of popular musicians in her book 'How Popular Musicians Learn' found that none of the eleven professional and semi-professional popular musicians in her study had gained a single qualification in music before they became professional (Green, 2001, p. 145). Green elaborates on the cultural values and practices of the fledgling popular musician wrapped up in the term 'informal music education'. In 2005, a joint Department of Further Education & Skills (DfES) and Department of Culture, Media & Sport (DCMS) publication came to define informal music as that which "happens when... people organise and lead themselves" (Rogers, 2005, p. 7). There exists little data as to where such informal music happens or how the economy of informal music education is supported. This is the subject of my thesis.

¹ www.culture.gov.uk/creative_industries/music/

² www.dti.gov.uk/ministers/speeches/hewitt290604.html

³ www.psi.org.uk/news/pressrelease.asp?news_item_id=9

The DCMS has identified six distinct generic activities published in its *Evidence Toolkit*⁴ that make up a continuous cycle in the production and distribution of cultural product:

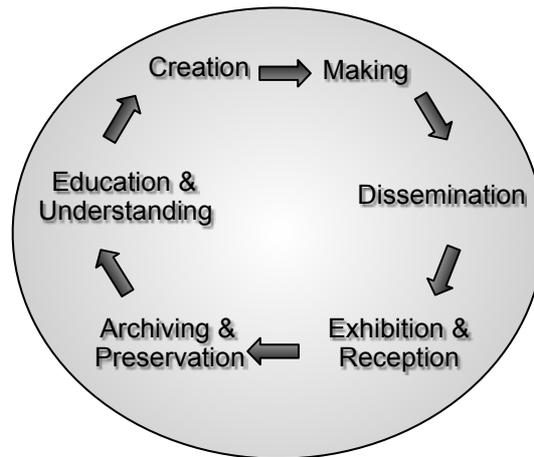


Figure 1: The cultural production cycle

The toolkit represents a first step in developing better data and statistics for the cultural sectors developed from a consultation process with bodies such as Regional Cultural Consortia, non-departmental public bodies, the Office for National Statistics and Regional Development Agencies. Apart from legitimising the intangible elements of cultural production, this process offers a useful framework to identify the creation, making and education & understanding elements of the cultural cycle in relation to the informal music economy. While a discussion about the dissemination, exhibition & reception and archiving & presentation of informal music will not feature in this paper, they could be informed by this work.

One writer who has been particularly concerned about musical creativity is anthropologist Ruth Finnegan. She conducted extensive research among ‘invisible’ musicians – those amateur, semi-professional, relatively unknown enthusiasts who play music week in, week out, in orchestras, choral societies, rock and jazz bands, folk groups and brass bands. The musicians Finnegan has studied are mostly people who play music for the pleasure of the experience, rather than those overtly attempting to ‘make it’ in the music business. However, most of their musical learning occurs in relation to existing records, sheet music and the well-known songs circulated by the recording industry. Hence, she argues, it would be misleading to think such musicians are ‘outside’ or independent of the music business, or that they are only tenuously connected through their consumption and appropriation of various products (instruments, amplifiers, recordings, etc.). Clearly, amateur or voluntary musicians involved in music-making on an informal basis contribute to the wider music industry.

⁴ www.culture.gov.uk/NR/rdonlyres/4B026ACA-025C-4C2F-A86E-4A96E406180E/0/DETTTechnicalReportv1August2004.pdf

2.1 The voluntary sector

While the primary aim of this paper is the measurement of the professional and commercial dimension of informal music, it is recognised much of it is voluntary. In a whole range of ways which should be read as implicit in this paper, the voluntary sector is closely related to the commercial professional sector. This paper will attempt to give prominence to the statistical dimensions of this element of musical activity as part of our wider range of leisure and recreational activities. Much of this paper is premised on empirical research, supported by various writers and academics in the field of music education and cultural studies.

It is also the case that some individuals gradually move up the scale to bookings at arts centres, concert halls and colleges. Some even become major stars. Without the music industry's complicit appreciation of the blurred boundaries between the voluntary or informal and professional worlds, as we shall see, much of the commercial success of this economy would not happen. In addition to this, it is important to understand the local infrastructures and progression routes out of the voluntary music sector underpinning the professional music world.

But first a further perspective on the prevalence of voluntary music participation comes from consumer and market surveys. One characteristic worth noting, although somewhat dated, are the figures for voluntary participation among the general population which reveal a high level of commitment to regular activity. With the exception of the category 'other singing', those categories of musical activity listed in Table 1 all recorded more than 50% of respondents involved on a regular basis.

	Regular %	Occasional %	Very Infrequent %	Don't know %	Total %
Playing a musical instrument solo	53	31	10	7	100
Choir	65	24	10	1	100
Other singing	42	42	14	1	100
Rock	68	25	5	2	100
Pop	68	24	7	1	100
Orchestral music	54	24	20	2	100

Table 1: Frequency of activity in music-making by selected types of music, 1991. Source: Arts Council of Great Britain/Research surveys of Great Britain. Respondents were presented with a list of 52 arts and crafts activities and asked: 'in which of these activities, if any, do you take an active part at all nowadays but not as a full-time profession?' Note that respondents could tick as many categories of activity as appropriate. It is probable that there is a high degree of overlap of individuals within various categories.

More recent statistics suggest 67% of people participated in at least one type of arts activity during the past 12 months (Aust & Vine, 2005, p. 2). Clearly, participation in arts and music activity is of great interest to many.

The voluntary sector in classical music and brass bands differs significantly from the fields of folk, rock and pop, jazz and country music. It is more formally organised with 19 identified umbrella bodies having an estimated membership of over 300,000. While some groups do come together on an informal basis, a large part of voluntary activity in this sector is based on a formally-organised structure (see Laing & York, 2001). The most significant aesthetic difference in participation between the voluntary classical music sector and the informal world of popular music is that the voluntary classical sector acts in its own right as an employer of professional musicians. According to Dane et al (Laing & York, 2001, p. 26): "The formal nature of amateur classical music and the process of learning a set of repertoire is largely an educative process which benefits from experienced professional input". Making Music is the national representative body for voluntary choirs, orchestras, and music promoters in the UK. Despite at least 138,000 (0.3%) of the UK population⁵ holding membership status via its member groups, this activity would fall under the non-formal banner (see definition in Chapter 2) rather than informal due to the activity being led by a professional individual (conductor, director, teacher, amateur, choral master).

In the commercial music world, it has traditionally been the case that through a rather haphazard process of an artist making contact with music business personnel will the songwriter and/or musician secure a 'deal' or funding to support the creation and making of new repertory. But this process has increasingly become fragile due to new modes of

⁵ www.makingmusic.org.uk/html/159.shtml

distribution and digital technology. Furthermore, record deals are extremely rare. Given the almost impossible task of quantifying amateur and semi-professional popular musicians, unconfirmed figures from a BBC2 Television series made in 1995, *The Music Biz*, suggest the market is huge: "When you consider something like 48,000 demo tapes are made each week, and out of an estimated half million bands in any given year, a mere 160 sign a recording contract."

Voluntary musicians can access the same commercially-run music rehearsal rooms as professional musicians. Such professional facilities given over wholly to the creation and making of music are accessible to those with sufficient financial resources. This paper will investigate the rehearsal room sector in London and by implication the critical part it plays in the music industry's economic and cultural production cycle.

2.2 Informal and popular

Using the DCMS/DfES definition of informal music quoted earlier and Lucy Green's elaboration of it provides a useful starting point in assessing its economic value. Green labels those musicians who use or have used informal music education practices 'popular musicians' (see discussion in Chapter 2), due largely to the work of writers such as Finnegan (1989), Negus (1999) and Miege (1989). This distinction will be used interchangeably from now on, although informal music practices may occur in other genres but to a lesser extent.

Popular musicians largely teach themselves or 'pick up' skills and knowledge, usually with the help or encouragement of their family and peers, by watching and imitating musicians around them and by making reference to recordings or performances and other live events involving their chosen music. Amongst the variety of vernacular musics that are passed on in ways such as these, popular music has always formed a major category. Some popular musicians have never been offered any formal music education, but many of those who have been offered it have found it difficult or impossible to relate to the musical practices involved (see, for example, Bennett 1980, Berkaak 1999, Cohen 1991, Finnegan 1989, Horn 1984, Lilliestam 1996). Moreover, Green asserts "...music education has had relatively little to do with the development of the majority of those musicians who have produced the vast proportion of the music which the global population listens to, dances to, identifies with and enjoys" (Green, 2001, p. 5).

Case Study 1: Christopher Small

I have been lucky enough to encounter musical experiences of power and beauty of an altogether different kind from that of either listening to, performing or even creating composed music; the degree of involvement is of a quite different kind, as one might expect from the exploration of one another's musical personalities in a loving way... It is small wonder that recordings and broadcasts can give no more than a pale misty image of the experience of improvised music, even with the finest and most intimately close-knit groups of performers.

Christopher Small
Music Education Society, 1977, p. 180

The idea of a 'culture industry' was first used by Theodor Adorno and Max Horkheimer (1979) in work first published in German during the 1940s. They argued that cultural items were being produced in a way that had become analogous to how other industries were involved in manufacturing vast quantities of consumer goods. This, they concluded, resulted in a standardised 'mass culture' lacking individuality and originality.

The economist Bernard Miege (1989) has however pointed out there are many differences between and within cultural industries according to aesthetic form, content, working practices, means of financing and modes of reception and consumption. Keith Negus has picked up on this and developed it: "To ignore such differences and claim that music... production is similarly standardised, dependent upon genre formulas, mass marketed and niche marketed, or involves a unified group of cultural gatekeepers, is to gloss over a series of significant differences of form, content, production, consumption and social mediation" (Negus, 1999, p. 22). Another significant difference between the subsidised and commercial music world is the music rehearsal room sector. Music rehearsal rooms are ubiquitous, if not crucial, to the amplified, instrument-playing, popular music sector where there is little acknowledged formal education, progression routes or pedagogy.

Lave and Wenger (1991) provide a discussion of apprenticeship learning, also known as 'situated learning', offering insights from an anthropological perspective in to informal music education. First, most young popular musicians in the West are not surrounded by an adult community of practising popular musicians, hence they tend to engage in a significant amount of goal-directed solitary learning. Second, in so far as a community of practice is available to young popular musicians, it tends to be a community of peers rather than of 'master-musicians' or adults with greater skills.

Ruth Finnegan used a somewhat different analytical framework to describe musical activity in Milton Keynes (Finnegan, 1989). Her analysis focused almost exclusively on musical participation based on what she found to be seven worlds of local music distinguishable not just by their differing musical styles (classical, operatic, brass band, folk, jazz, country and western, pop and rock) but also by other social conventions:

- the people who took part
- their values
- their shared understandings and practices
- modes of production and distribution
- the social organisation of their collective musical activities

These initial glimpses into informal music-making will be contextualised in Chapter 2.

Writers such as Green (2001), Small (1977), Lave & Wenger (1991) and Nketia (1975) argue many people living in 'modern' industrialised countries lack the experience of creation and therefore confidence in distinguishing what is worth consumption from what is not. In handing the creative function of art over to professionals, a division has been created between those who produce and those who consume. Small argues: "The process is paralleled in many areas of society that we have turned over to professionals, including education, in which young people are mere consumers of knowledge" (Small, 1977, p. 94-95). Poor access to understanding the creative and making processes inevitably affects the other elements of the cultural production cycle outlined at the beginning of this chapter. Rick Rogers, in his research project on the work, education and training of professional musicians in the 21st century, *Creating a Land with Music*, argued: "It is essential that the training of musicians is related to the needs of the industry" (Rogers, 2002, p. 13).

London is a special case in terms of the concentration of music activities - the 1991 Census of Population indicated that 36% of all 'musicians' were resident in London. There is a wide range of provision for music in the capital, spread across publicly funded education and arts sectors, as well as informal and recreational sectors, commercial operations and religious and cultural networks. The purpose of this research was to draw attention to the informal music-making sector.

What follows is an outline discussion of the formal, non-formal and informal music education sectors, as defined by the *Music Manifesto*, followed by setting the context for their developing economies. A focus group was set up and consulted to test the *Music Manifesto's* definition, followed by a discussion on recent empirical research of the likely extent and market for informal music-making. The methodology used to gather the evidence of its economic size is put forward in Chapter 6, followed by a chapter dedicated to the results. A more general approach is taken from the findings and their implications for government policies, before a conclusion is reached on the importance of the sector, its pedagogies and a suggested way forward.

*You're working at your leisure to learn the things you'll need
The promises you make tomorrow will carry no guarantee
I've seen your qualifications, you've got a Ph.D.
I've got one art O level, it did nothing for me*

Lyrics to the song, *Rat Race*, by Roddy Byers, released by The Specials, May 1980

3. Towards defining the formal, non-formal and informal music education sectors

It is commonly accepted formal education is linked with schools and training institutions; non-formal with community groups and other organisations; and informal covers what is left, e.g. interactions with friends, family and work colleagues. Despite the awareness of contemporary supporters of popular music in education, explicit emphasis on the informal learning practices of popular musicians is not a central part of music education research and literature. However, the changing face of the music industry is challenging music education and training providers to reappraise their priorities and ensure what they offer is fit for the purposes of the 21st century musician. This applies as much to the primary school as it does to the conservatoire and beyond (see Rogers, 2002).

Peggie found in his study of London's school music providers that in spite of the oft-stated vocational justification of many, that no-one has really worked out the vocational value of their work (see Peggie, 2002, p. 17). The skills required for admission to a conservatoire are not those gained from the general school curriculum

and thus the number of suitably qualified applicants depends heavily on early instrumental tuition (see Rogers, 2002, p. 21). The inevitable corollary to this is that participation can be best widened by investment within the primary school music sector. Given limited resources, there is undoubtedly a residual tension between the inclusive 'we are all musicians' approach and the need to provide specialist instruction across a huge range of differing instrumental skills, many of which will only ever be feasible on an exclusive basis.

For individuals best learn in different ways - they have 'preferred learning styles'. Getting it wrong for an individual at a crucial time in their progress can mean the difference between them carrying on or giving up. But Rod Paton has argued music making is often given up when people grow up: "From that point on, the responsibility for the production of music is left to 'specialists' or 'pop artists' or the recording industry or programme planners. But music has the potential to play a central role in people's everyday lives, charting the rituals of growth and development, articulating the emotional and spiritual pathways of their lives" (Paton, 2000, p. 3). Do the existing school music education pedagogies exclude or discourage some individuals from wishing to continue their music-making in to adult life?

The *Music Manifesto's* music education sectors:

Formal: *what takes place in statutory provision or with statutory funding in schools, colleges, music services*

Non-formal: *what takes place outside formal education provision, but can include out-of-hours work in schools, supervised by adult professionals*

Informal: *what happens when young people organise and lead themselves without adult supervision*

Rogers, DCMS/DfES, 2005, p.7

There is another point to be made around the formal and informal pedagogies. That is, in the democratisation of culture: "... the consumer is seen as playing a rather passive role... based on the silent and contemplative attitude of what we may call a 'Victorian audience'... In the democracy paradigm, the consumer plays a more active role, which may even involve his participation, and which is closer to how audiences behaved in previous centuries or behave today at popular forms of entertainment" (Evrard, 1996, p. 93). A gap exists between those choosing on the basis of 'superior' aesthetics which repertory (and their pedagogies) are to be taught in schools, and the 'emotional and spiritual' interests of the recipients, fuelling a downward spiral of demand for formal music tuition.

3.1 The formal music education sector

Since the mid-nineteenth century, Britain has seen the development of what has become an internationally renowned tradition of classical instrumental tuition, supported by youth orchestras and other ensembles, junior music schools, summer schools and many other activities. This has come about as our liberal education system has developed in line with our advanced industrial economy where formal education practices have been refined.

A short history lesson. Jacques Attali in his book *Noise*, offers an illuminating account of the development of professional 'classical' music and by implication its ethos. The feudal world remained a world of circulation in which music was inseparable from daily life, active and not something to be watched. In the fourteenth century, everything changed. Musicians became professionals bound to a single master as producers of music exclusively reserved for his court. By the sixteenth century, the courts had banished the jongleurs, the voice of the people, and no longer listened to anything but scored music performed by professional salaried musicians. Jacques Attali accounts for this as: "... court musicians continued to draw from the popular repertory: they composed motets or masses based on songs from the streets, but they were unrecognizable in their polyphonic complexity" (Attali, 1985, p. 17). Eventually, the musician would sell his labour to a number of clients, who were rich enough to pay for the entertainment, but not rich enough to have it to themselves: "Music became involved with money. The concert hall performance replaced the popular festival and the private concert at court" (Attali, 1985, p.47).

In line with this, formal music education practices have developed an increasing association with the production of professional classical musicians for the modern-day concert hall. This is evidenced by conservatoires' priority to 'fit' students for high-quality performance: "A combination of the culture of conservatoires and HEFCE's premium funding criteria, and specifically the requirement to have 75% of graduates working primarily as performers of music, inhibits conservatoires from providing a teacher-training element" (Rogers, 2002, p.

14). Paton has contested that such musicians have lost music's social significance where even the most fluent performance of a Bach Prelude and Fugue, a Mozart Sonata or a Bartok Ostinato is not going to go down particularly well at a party: "it has no context, beyond the examination room, in which to function" (Paton, 2000, p. 3). Music has become professionalized where its pedagogy: "...has tended to recognise and reward only certain aspects of musical ability, often in relation to certain styles of music, thus aiding the appearance that only a minority of human beings have musical ability" (Green, 2001, p. 210).

Most commentators would agree there is little wrong with the pursuit of high standards in music performance and the formal teaching of their requisite skills. Underpinning the ethos of formal music education is a strong sense of pedagogy: skills development, knowledge and understanding, training, programmes of study, etc. Even the references to personal and social development take place in a context of signing up to a disciplined course of study, useful in itself in adult life and the workplace. But Peggie supports the view that: "... they reinforce a particular view of music as a mechanism for achieving... musical literacy... over musical oracy" (Peggie, 2002, p. 13).

3.2 The music curriculum

Instrumental skills demand work in the private world supported by a formal teaching pedagogy. Private lessons are available either by personal arrangement with a teacher or through a school or other centre; funded lessons are provided in some schools and music centres by Local Education Authorities or are included as part of the overall fee by most further and higher education institutions. One-to-one tuition is the traditional norm, although small groups of three or more students per lesson are by no means uncommon. In formal music education, an emphasis is placed upon the rigorous development of technique and its application to the sensitive interpretation of a limited repertoire of pieces. Such practice can also be associated with Eraut's (2000, p. 12) description of formal learning as that which takes place where there is:

- A prescribed learning framework
- An organized learning event or package
- The presence of a designated teacher or trainer
- The award of a qualification or credit
- The external specification of outcomes

Only a minority of the population takes up the opportunity of formal instrumental lessons. Peggie's survey estimated that LEA-based MSAs in London reached on average nearly 10% of the total school population, within a range from 3% to 22% (see Peggie, 2002, p. 17). Dr Susan Hallam's work in 2005 found 8.4% of the school population was receiving tuition, 13%

in Key Stage 2 (7-11 year olds), 8% in Key Stage 3 (12-14 year olds) and 5% in Key Stage 4 (14-16 year olds) (Hallam, S. et al, DfES, 2005, p.65). A much larger proportion of children and young people have music lessons in their school classrooms. It is in schools that opportunities are given for the vast majority of the population to engage with music learning of a formal nature. In England, music in schools is now an entitlement through the National Curriculum and therefore affects, or should affect, the entire population.

A 'new classroom music education' took hold during the second half of the 1980s and through the 1990s which had a major effect on music education in England and Wales, where the curriculum underwent a transformation. The new syllabus included the stipulation pupils should study various styles of music including folk and popular music, jazz, contemporary classical music and the misnamed 'world music'. All pupils, for the first time, were required to demonstrate ability in three areas⁶:

- Music listening to a wide variety of styles
- Performance on any instrument from the sitar to the electric keyboard
- Original composition, improvisation and/or arrangement, in any musical styles of sub-style

As well as the above changes in exam syllabi and curricula, the development of cheap electric instruments and music information technology has had a major impact on classroom practices. Electric keyboards have become very common. They can also be taken, along with other classroom instruments, into practice rooms for small-group work. In addition, increasing numbers of schools have purchased recording equipment and computers with music hardware and software; and the presence of a dedicated recording studio in a school, although not common, is far from a rarity.

Meanwhile the majority of people who have received instrumental or vocal lessons at school, of course, do not become professional musicians, but find themselves at the bottom of a very long ladder, the top of which they know will always be out of reach. The relatively new breed of music education providers, so called community music organisations, are for the first time, making their voices heard at all levels, local to national. Many of these agencies began life as a deliberate alternative to what was being offered by the local education authority where: "Notation and the business of learning to play an instrument well were of far less importance than stimulating the musical imagination.... The notation of music, it was felt, can distance people from the experience of making music" (Everitt, 1997, p.67 & 84).

3.3 The non-formal music education sector (community music)

⁶ www.curriculumonline.gov.uk/Subjects/Mu/Browse.htm?hid=1002075

The history of the 20th century could be described and, more significantly, understood in relation to a series of cultural movements, events and individuals. The birth of popular music coincided with that of community arts. This was important for a number of reasons. Firstly, so far as Britain was concerned, pop music was of great cultural significance because it was led by a generation of working or lower-middle class musicians who for audiences produced a new and original form of urban industrial folk of the ballad tradition of which they could identify. Secondly, the economic 'coming of age' of young people for the first time in history had sufficient funds at their personal disposal to become an economic force in their own right. Informal education too had become embedded in the very fabric of youth work, motivated by a desire to ensure the general welfare of young people. In the 1970s, the emerging community arts sector, and more specifically the youth arts branch, carried this desire forward with a determination to harness young people's creative energy to help meet these needs. These new forms of popular and community music-making seemed to modify the conventional relation between active performer and passive audience. Anthony Everitt has argued: "Rock concerts were (and still are) communal celebrations... digging up the lost roots of music long since overlaid by the polite manners of the classical music experience" (Everitt, 1997, p. 82).

Case Study 2: Producer Howie B and U2

When I worked with U2 it was about making them feel comfortable and encouraging them about being the best they can be. I would rehearse them and rehearse them through tracks until I felt they were talking to each other through their instruments to the point they were bouncing off each other without thinking and creating dynamics in the room... The less and the quieter they played as a band, the more air they would have to move in. It's the space between and around the notes that allows the real essence of the music to breathe. This can only be achieved when a band plays organically and really listens to each other so that they can hear the song.

Howie B quoted in Kevin Harris & Stephen Colegrave, *Inside Music 2005*, 2004, p. 267

Popular music brought with it huge interest in amplified guitars and drums. Not only were these instruments relatively affordable by young people, but it was possible to achieve more than adequate musical results without years of formal training. The community-based workshop practice began to become widespread. The object of this work involved community musicians placing their talent at the disposal of others by collaborating with them on a basis of equality rather than skills, often more informal and youth-oriented in nature and less inclined to plug into the graded exams network offered by the formal sector.

Arts Council England's (ACE) arts classifiers used to record artistic activity when assessing its Grants for the Arts programme defines community music as "participatory music which involves groups and individuals creating music in social or community settings such as health, education, social services and youth justice. It can be facilitated by professional musicians or amateurs through workshops, skills development and training and can conclude with a performance. It can incorporate a mixture of workshop-based activity and performance."

What Peggie describes as 'rough music' became the domain of the non-formal or community music sector: "Rough music is street music: direct, noisy, energetic, sentimental, quickly assembled and usually transmitted orally. Popular (chart) music is rough music... [which] invites participation and instant gratification, perhaps at the expense of sophistication" (Peggie, 2002, p. 19). This is in stark contrast to: "Amateur music, as practised by music societies, [which] is often perceived by those under 30 years of age to be a middle-class, middle-aged pastime ... Is it any wonder that young people find classical music unappealing when the concept of presentation has not changed fundamentally since the eighteenth century" (NFMS, 1996, p.6).

The ideology of community music has opened out with the years. CM⁷, a training and education centre in central London, is one of the key agencies working in the field. It has positioned itself at an intersection where 'traditional' neighbourhood-based community practice, commercial popular music and the formal education sector meet. It helped to establish other important projects elsewhere in London, such as ADFED, Bigga Fish, Raw Material, MIDI Music, Urban Development, Overtones and Weekend Arts College.

Peter Renshaw, formerly of the Guildhall School of Music and Drama, whose main concern was to relate community practice to a reform of orchestral practice has, however argued that: "Community music is too much rooted in locality, to place in a narrow sense. This means that it doesn't really 'empower', for it locks people into their cultural relativity, even if it does politically empower. There is little sense of wider standards" (quoted in Everitt, 1997, p85). Renshaw's broadside came at a time when ACE's music department adopted a policy that recognised the full spectrum of music based on the premise that: "...individuals have increasing amounts of leisure time, there is a growing demand for opportunities to participate in new music, whether through access to recording studios for young people or through amateur ensembles and adult education" (ACE, 1996, p. 2). But this polarised debate within music education seems to be abating with its new sibling, informal music, taking the space left vacant by the non-formal sector's entry in to the National Curriculum.

Informal practices are not only a window into alternative methods of learning and making music, but they increase the possibility of producing musical styles whose ideals are more vernacular, more collaborative and which are primarily led by enjoyment and love of music and music-making: "The only missing factor is a set of conditions which allow them to do this, not condemning them for lack of facility but facilitating them to discover their own musical natures through expressive and creative activity in the company of others" (Paton, 2000, p. 4-5).

⁷ www.cmonline.org.uk/page.cfm?content=history

Explicit attention to musical elements that cross over many styles including popular genres, has become increasingly common and is today of major significance in the music classroom in Britain. Green (2001, p. 204) summarised a number of distinctive characteristics uniting the formal and non-formal music education practices:

- supervised to some degree by a teacher
- exercises are nearly always pre-designated, perhaps with some choice, by the teacher
- students are requested to demonstrate their work to their peers
- in many cases, students are assessed
- any misbehaviour or failure to cooperate can become the business of the teacher

This richness of provision is beginning to create a more sophisticated and possibly more flexible environment for music education. However, Green (2001) found whilst popular music and 'world music' in general have risen to a high status on a par with classical music in the curriculum of many countries: "...teachers are tending to adopt formal educational approaches towards these musics which hardly differ from their approaches towards Western classical music... than the wide variety of musics in the curriculum might seem to imply... overriding many helpful learning practices that are habitually employed outside the formal educational institution" (p. 180 & 183).

Green formulated a hypothesis: "...that formal popular music instrumental tuition methods have much in common with formal classical instrumental tuition, and relatively little in common with informal music learning practices" (Green, 2001, p. 178). Commercially successful as mass popular music is, its elusive and informal qualities are drawn inevitably from alternative, anti-establishment, fringe activity which is, by nature, under-funded: "As soon as the process becomes another part of the orthodoxy, the music itself relocates in a new part of the fringe" (Peggie, 2002, p. 18).

3.4 The informal music education sector (you don't learn to play badminton by reading a book!)

The whole point of current popular styles is that participants learn informally by imitation and peer group association, rather than through a formal teacher-pupil relationship. Young popular musicians have acquired their skills and knowledge for decades by copying their favourite recordings through peer interaction and without any intervention from teachers. Finnegan suggests learning by listening and copying recordings: "...has given the opportunity for a revolution in music-learning processes" (Finnegan, 1989, p. 138). Tennant has described the central and defining feature of informal learning is context: "Novices enter

at the edge – their participation is on the periphery. Gradually their engagement deepens and becomes more complex. They become full participants, and will often take on organizing or facilitative roles. Knowledge is, thus, located in the community of practice” (Tennant, 1997, p. 77). Perhaps some may even increase their commitment to music-making as a reaction against the prevalence of recorded music.

Usually when informal groups start they rehearse at home. It is not until the parents or neighbours get so annoyed with the volume required for an amplified band are they forced to practise in an undesignated environment, such as a village hall or the back of a pub. However, it's at this stage the band may opt to hire a professional rehearsal room. It is at this point when the group moves from the private sphere that informal music-making enters the public realm bringing wider economic and social implications.

Solitary learning practices are also accompanied by other equally significant practices which take place through interaction with friends, siblings and other peers: “Making music is a social activity... used almost exclusively in circumstances where people themselves need to interact in some way. This is true even for solitary listening (radio or CD), since in doing so, the listener is making an invisible connection with all the other people who enjoy the same kind of music” (Peggie, 2002, p. 8). These practices include peer-directed learning and group learning. Peer-directed learning involves the explicit teaching of one or more persons by a peer; group learning occurs as a result of peer interaction but in the absence of any teaching. Either type of learning may take place between only two people or in groups of more than two; it can arise in casual encounters or organised sessions; it can occur separately from music-making activities or during rehearsals and jam sessions (see Green, 2001, p. 76). Indeed Green calls for further research comparing peer-directed and group learning across different popular music sub-styles.

In Green's study she found her subject's schools made resources, space and time available for them to form bands and 'get on with it' by themselves, but it often gave the impression the teacher was not 'doing much', whilst the input was actually crucial. The main large-scale necessity involved providing physical space and an amount of sound-proofing away from other classes where group improvisation, jamming and composition are of great significance in the development of popular music skills and knowledge.

It seems an extraordinary fact that many thousands of young musicians across the world have adopted this approach to learning over a relatively short space of time – covering a maximum of 80 years since sound recording and reproduction technology began to be widespread – outside of any formal networks, usually at early stages of learning, in isolation from each other, without adult guidance and with very little explicit recognition of the ubiquity of the practice across the world. But community music organisations are historically

exercised by the question of how much intervention is acceptable beyond simply providing space, resources and opportunities for performance. Indeed, the optimum conditions probably cannot be achieved through formal education channels either. And by implication, the funding sources for this kind of approach are unlikely to be through educational sources.

The inclusion of popular, as well as jazz and other world musics in both instrumental tuition and school curricula, has not necessarily been accompanied by any corresponding changes in teaching pedagogy. The majority of classical instrumental teachers and classroom music teachers are formally trained and many have never engaged in informal learning practices at all. Therefore, formal music education, instrumental and classroom programmes are bound to involve practices that are very different from those in the informal sphere. At the very least, formal popular music instrumental teachers cannot be assumed to teach their students in ways they themselves learned: “Informal learning should no longer be regarded as an inferior form of learning whose main purpose is to act as the precursor of formal learning; it needs to be seen as fundamental, necessary and valuable in its own right, at times directly relevant to employment and at other times not relevant at all” (Coffield, 2000, p. 8).

To help qualify the definition of informal music, a focus group of professional music workers was put together and asked their views. But first, a closer look at the economy in London supporting the formal and non-formal music education sectors will help set the context.

The man that hath no music in himself, nor is not mov'd with concord of sweet sounds, is fit for treasons, stratagems, and spoils

William Shakespeare, *The Merchant of Venice*

4. London's music education economy

Funding for music education comes from a plethora of sources. By far the largest share comes from national (DfES) and local council purses, distributed via a local council's Local Education Authority (LEA) as part of its statutory obligation to the National Curriculum. In London, most of this funding is directed to a music service which is charged with meeting the music education needs of school children in-school hours. The range of needs is wide, from infant, junior and senior pupils in schools and colleges to specialist young musicians and further and higher education students; from adult learners, community enterprises, people with special needs, enthusiastic amateur performers and composers to the high demands of appraisal, inspection and assessment.

4.1 The formal music education economy in London

Laing and York estimated an annual expenditure on London's specialist music services for secondary schools amounts to £16.5m and that there are about 1,500 full-time equivalent (fte) instrumental teachers working in London giving an annual turnover for private teaching of £24.3m. There are five conservatoires in London for which the Higher Education funding body gives an annual funding requirement of £23m. Full time university courses annually expend £13.5m across 12 institutions. Total expenditure on mainstream higher education in music in the London region could thus amount to about £37m a year with an additional adult education sector turnover of £1.575m per annum (Laing & York, 2001, p. 22). This gives an annual expenditure total for formal music education in London of nearly £79.5m (see figure 1). In his study, Peggie made a firm conclusion that there are as many different income/ expenditure routes as there are London LEAs (Peggie, 2002, p. A-5).

In 2005, the DfES conducted a national survey of local authority Music Services' provision to build a comprehensive picture of the different types and levels of provision⁸. It found considerable change had taken place in relation to improving their service to the wider community, but this relied on changes to more integrated services at local authority level. Some still have an over reliance on particular income streams. On average 43% of income came from the DfES Music Standards Fund (via the LEA), 25% from schools, 16% from families, 13% from local authorities and 3% other income (Hallam, S. et al, DfES, 2005, p. 61). The report writer concluded: "There continues to be a need for diversity in the way in which Music Services are funded to ensure their security in the longer term" (Hallam, S. et

⁸www.federationmusic.org.uk/docs/dfes_survey005.pdf, p10-11, 2005

all, DfES, 2005, p.10-11). Although LEA-based Music Services derive the majority of their income from the government directly, the LEA and parental contributions, Hallam noted that those which were able to diversify their funding were in a stronger economic position than those which relied solely on one or two sources.

To understand further how music in schools is funded it is perhaps important to explain recent developments. The Associated Board of the Royal Schools for Music (ABRSM) argued the Education Reform Act in 1988 had the unintended effect of almost devastating local authority Music Services during the 1990s with many cohorts of school children losing the opportunity to learn to play musical instruments (this has been estimated at 300,000). For 30 years before that time, local authority Music Services had received secure funding and had delivered growth in the number of young people learning to play a wide range of musical instruments across the country. In the late 1990s an intensive period of campaigning to government by a range of organisations concerned with music education (most notably the Music Education Council, the National Association of Music Educators and the Federation of Music Services) argued that for instrumental tuition to be effective it needs to be organised at a level above that of the individual school.

In response, in 1999 the Music Standards Fund was established by the DfES “to protect and expand local authority Music Services” and in 2001 David Blunkett, then Minister for Education, made the pledge that “over time, every child should have the opportunity to learn to play a musical instrument”. In 2003 the Government initiated a number of pilot schemes through selected Music Services to provide “wider opportunities” for whole classes of young people to gain access to music in schools. The ABRSM, however, argued that in practice the situation has been far from satisfactory. Over a short period of time it became clear that the central funding injected through the Music Standards Fund in 1999 was matched by a corresponding reduction in the funding provided to Music Services by their own local authorities. Thus the overall impact was to stem a tide rather than to remedy the underlying problem⁹.

In 2006-2007, each local authority will receive a baseline grant (grant 116a) for ‘access to local authority Music Services’ (see table 2) for 7-11 year olds at Key Stage 2 (KS2). In London, this will amount to nearly £8.5m. To further support the DfES KS2 programme, local authorities will receive a new allocation through the Music Standards Fund (grant 116b), which should be devolved directly to primary schools and to special schools serving KS2 pupils (amounting to £3.7m over 2 years). In total, London’s LEA’s will receive £20.3m over 2006-08 for KS2 pupil’s music education from the DfES Music Standards Fund. Assuming the Music Service expenditure has changed little, with the additional Music Standards Fund

⁹ www.abrsm.org/?page=press/pressReleases/item.html&id=315

grant 116b, this brings the total annual spend on formal music education in London to £81.5m.

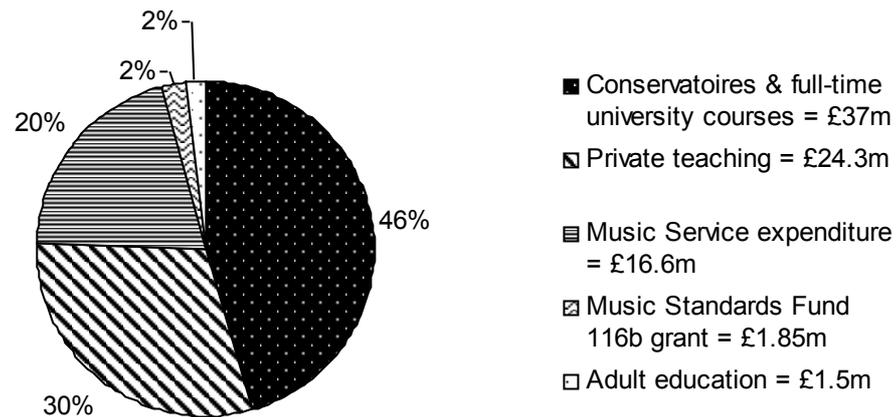


Figure 2: Percentage annual expenditure on formal music education in London

The DfES website says: “Schools themselves are likely to require support in devising models of delivering instrumental and vocal tuition to large numbers of pupils at Key Stage 2 – and in identifying suitable providers. Many will wish to buy in provision direct from local authority music services. Others will wish to design their own programmes of work or to target particular groups of pupils within the school... It will be for individual local authorities to decide how best to distribute their share of this money to providers of KS2 education with the overall aim of reaching the maximum number of KS2 pupils.”

The rationale for focussing intervention at KS2 is based upon providing school pupils with the building blocks and sufficient critical awareness to make informed choices about their music-making when they enter secondary school.

DfES' Standards Fund allocations for music

Local authority	2006-07		2007-2008		TOTAL
	116a	116b	116a	116b	
	£	£	£	£	£
Corporation of London	6,753	153	1,753	1,169	9,828
Camden	383,500	8,133	373,500	62,354	827,487
Greenwich	274,228	14,507	264,228	111,221	664,184
Hackney	370,380	12,444	360,380	95,401	838,605
Hammersmith & Fulham	167,481	6,903	157,481	52,923	384,788
Islington	232,002	10,295	222,002	78,931	543,230
Kensington & Chelsea	95,513	4,958	85,513	38,010	223,994
Lambeth	243,044	13,685	233,044	104,917	594,690
Lewisham	287,833	15,047	277,833	115,357	696,070
Southwark	371,237	16,144	361,237	123,771	872,389
Tower Hamlets	414,449	15,842	404,449	121,456	956,196
Wandsworth	273,101	11,580	263,101	88,783	636,565
Westminster	373,500	7638	363,500	58,557	803,195
Barking	227,091	12,554	217,091	96,247	552,983
Barnet	203,251	17,854	193,251	136,877	551,233
Bexley	220,000	14,496	210,000	111,137	555,633
Brent	264,159	15,811	254,159	121,214	655,343
Bromley	186,838	17,588	176,838	134,840	516,104
Croydon	267,764	20,883	257,764	160,103	706,514
Ealing	345,508	17,746	335,508	136,052	834,814
Enfield	299,111	19,131	289,111	146,674	754,027
Haringey	357,000	15,013	347,000	115,097	834,110
Harrow	168,000	12,577	158,000	96,423	435,000
Havering	170,286	14,239	160,286	109,165	453,976
Hillingdon	213,534	15,925	203,534	122,089	555,082
Hounslow	370,000	12,819	360,000	98,278	841,097
Kingston Upon Thames	153,000	7,452	143,000	57,129	360,581
Merton	178,221	8,959	168,221	68,686	424,087
Newham	523,737	21,167	513,737	162,281	1,220,922
Redbridge	221,511	16,310	211,511	125,041	574,373
Richmond Upon Thames	169,600	8,194	159,600	62,821	400,215
Sutton	141,322	10,257	131,322	78,638	361,539
Waltham Forest	279,225	14,839	269,225	113,763	677,052
TOTAL	8,452,179	431,143	8,127,179	3,305,405	20,315,906

The new Music Standards Fund 116b represents opportunities to share a wider pool of skills or as the *Music Manifesto*¹⁰ describes: “design... programmes of work” within the schools’ music sector. Richard Morris, Chief Executive of the ABRSM said: “[The] decision to allocate £26 million worth of the additional funding [nationally] to schools rather than to Music Services [is] ... liable to plunge back into the crisis conditions of the mid-1990s, with schools often opting to purchase the cheapest available tuition, rather than to provide the full variety of instrumental and ensemble opportunities and the proper progression routes available through Music Services.”¹¹

Perhaps what Morris means by the cheapest available tuition is the: “professional, amateur and pro-am [musicians] – who seem to gain little benefit from either subsidy or commerce, but who attract substantial followings...” (Everitt, 1997, p. 17) and whose “socially embedded music-making is effectively inaudible to local and regional government infrastructures, thus distorting the effects of subsidy and creating wrong assumptions about level of activity” (Peggie, 2002, p. 8). This policy development will test whether a change in how school music education can be delivered will open up more opportunities for those who have not come through the formal music education sector.

But Matarasso argues: “...to consider only the financial impact of cultural activities is to produce a distorted picture of their actual value to society. In fact, they deliver a range of wider economic benefits through their associated social impacts” (Matarasso, 1997, p.2). The present government has realised this and taken active steps to promote music-making for children and young people in community settings by establishing the National Foundation for Youth Music. Youth Music has made a difference, not only in specially targeted areas around the country, but also to the amount of work now available to musicians and music organisations that tended to operate outside the mainstream traditional settings.

4.2 The non-formal music education economy in London

Non-formal music education organisations derive their funding from many different sources, including local authorities, health authorities, other civic agencies, national lottery and trusts and foundations to deliver work in and out of schools. Peggie estimates their annual consolidated expenditure amounts to £1.5m annually (see Peggie, 2002, p. A-9). Certainly the sector in London is largely supported through ACE London’s Regularly Funded

¹⁰ The Music Manifesto is a unique collaboration between the DfES and DCMS with music organisations, musicians, teachers and composers, the music industry, broadcasting, teacher and musicians’ unions, arts and education charities and Trusts. At the heart of the music manifesto is a desire to see more opportunities in music for more young people.

¹¹ www.abrsm.org/?page=press/pressReleases/item.html&id=315

Organisation portfolio amounting to nearly £850k pa (see table 2) which does not include Arts Council project funding.

Organisation	Local Authority	2005/06	2006/07	2007/08
Asian Dub Foundation Education	Tower Hamlets	42,025	43,181	44,368
Bigga Fish	Brent	63,037	64,771	66,552
CM	Southwark	190,000	195,225	200,594
Midi Music	Lewisham	110,000	113,025	116,133
Overtones	Camden	110,000	113,025	116,133
Raw Material Music & Media	Camden	110,000	113,025	116,133
Urban Development	Newham	90,000	92,475	95,018
Weekend Arts College	Camden	100,000	102,750	105,576
TOTAL		815,062	837,477	860,507

Table 3: Funding of Regularly Funded Organisation's working in non-formal music education.
Source: www.artscouncil.org.uk/downloads/rfollondon.doc

The *Music Manifesto* however calls for the music education sector across both formal and non-formal settings to address the need to cater for growing numbers of 'bedroom musicians' informally creating music on PCs but often in isolation and with no assistance or assessment. This has profound implications across music and education sectors in terms of what they provide, where and how. Furthermore, the DfES' White Paper on Education and Skills for 14-19 year olds¹² seeks to create broader, more accessible and individualised routes for young people to build on their particular skills and talents, including music. The Qualifications and Curriculum Authority (see QCA) also suggests the 14-16 age group is critical in the uptake of subsidised instrumental tuition (QCA, 2003/4). It is a time when young people drop out of formal music in school, but more readily engage with music in informal settings committing considerable time listening to music, experimenting with software and exploring a range of music sources. Indeed, the QCA suggests investigations are needed to explain why pupils who really enjoy music do not wish to continue the formal study of music at Key Stage 4 (14-16 year olds).

The challenge is to make a greater level of collaboration and openness than has existed in the past, according to the *Music Manifesto*. The additional £26m going to LEAs for instrumental tuition at KS2 of the school national curriculum will help to establish a new market. This will inevitably affect demand within the schools' music economy, and opportunities to forge links with the wider music economy, not least in London. Evidently, the economic value of formal and non-formal music education is relatively well documented, whereas there is little evidence of the scale of the economic value of informal music.

¹² www.dfes.gov.uk/publications/14-19educationandskills/

You glorify the past when the future dries up

lyric line from the song *God Part II* by rock band U2
on their album *Rattle & Hum* (1987)
dedicated to John Lennon

5. The Focus Group

A focus group was set up and members emailed a brief questionnaire (App. 1) to determine as far as possible a consensus definition of informal music-making and its related settings. Members were selected on the basis of their professional work related to music-making with children and young people. A detailed questionnaire was avoided, presuming many respondents led busy professional lives: the aim was to encourage focus group members to reflect and respond more fully to fewer questions. The downside to this approach was that there was no room for discussion, and therefore greater qualification and perhaps consensus amongst members. The focus group was made up of 128 named individuals (App. 2) working in the following sectors:

- Arts funding
- Arts and music organisations
- Arts in Health / Arts & Disability organisations
- Community music organisations
- Conservatoires
- Creative Partnerships
- Education Managers for London orchestras
- Further & Higher Education
- Government agencies and statutory bodies
- Independent education and training providers
- LEA Music Services
- Music Consultants
- Performance venues
- Policy-makers
- Schools
- Youth organisations

This large focus group provided a significant response to qualify the *Music Manifesto's* definition of informal music. Such a revised definition gave greater confidence to find answers to the research question: What is the economic value of informal music-making in London?

5.1 Focus Group results

Out of 128 people contacted, 22 responded (17%). 13 out of the 22 did not agree with the *Music Manifesto's* definition of informal music (59%), with two don't knows. Although nearly two-thirds of respondents either did not or could not agree with this definition, seven respondents (32%) agreed that informal music can still occur with minimal adult supervision under the following circumstances:

"Formality would surely be judged by the planning and delivery framework."

"It could still be informal whilst including occasional adult supervision, as long as the adult is not organising the sessions."

"Adult 'supervision' would not automatically stop young people informally making music... Some groups of young people would have adult supervision... but not actually supervising the creative content of any session."

"One might be being supervised in some way, but the tone of the practice might nonetheless still be informal... what some of us might understand as informal... might for others feel highly restricted and/or over formalised."

"It is questionable as to whether with children and young people adults are never involved... they [children and young people] may put themselves in an adult supervised learning environment for a specific purpose, moving between formal, non-formal and informal as suits their purpose."

"A more useful definition might be that which 'happens when young people organise and lead themselves without adult direction' since this means that the activity is being led, as opposed to an adult merely supervising what is going on."

"What makes them 'informal' is the absence of any:

- Compulsion to be involved
- Selection of participants
- Evident leadership
- Pre-arrangement of repertoire
- Particular seating arrangement
- Use of notation"

Informal music-making, as understood by the focus group members, has an aesthetic value attributable to legitimising their own work and pedagogy because without exception, they all worked in formal or non-formal contexts. When the focus group members were asked to give examples of where they had seen informal music take place, they came up with far more interesting responses:

"youth clubs, community settings"

"rehearsal studios"

"workshop session/jam"

"living rooms and garages... commercial rehearsal room"

"Rehearsal rooms, recording studios, bedrooms, garages, schools, youth centres, back rooms"

The *Music Manifesto's* definition of informal music:

what happens when young people organise and lead themselves without adult supervision
Rogers, DCMS/DfES, 2005, p.7

“pubs... common room or bar”

“garages/garden sheds/bedrooms”

“school facilities outside of school hours”

“premises”

“A jam session, at home, or a street parade...”

“at school and in youth centres or at each other's houses”

The most commonly sited physical spaces were in the home (6) followed by a youth club or community setting (5), rehearsal studio (4), garage (3), school (3), pub/jam (3) and recording studio (1).

5.2 Focus Group conclusion and ways forward

Although private activity in the home and garage is often without adult supervision (and at times solitary) it is likely to have little economic value due its private nature. A youth club, community setting and school would be supervised by an adult or cost very little and likely to be ad hoc and difficult to quantify. Child protection issues will be of prime importance in public settings when working with children and young people, thus requiring adult supervision. There is no economic value in informal music-making in many youth and education settings because such activity is either adult-led/organised or free of charge to participants (apart from of course the cost of instruments and equipment).

The pub or jam would be more closely associated with a public performance and therefore likely to involve existing knowledge of repertory or standards and come after informal music-making (and a different element of the production cycle). Due to the expense of hiring a recording studio, the focus amongst participants is more likely to be on recording the finished work (and again, a different element of the cultural production cycle). It would therefore appear that the rehearsal studio lends itself well to an environment that qualitatively supports an economy of informal music-making.

Most informal music-making with children and young people, as described by the *Music Manifesto*, has little direct economic value. Instead, perhaps the outcomes of informal music-making have significant deferred economic benefits during adulthood in terms of the performing, recording, licensing and associated industries. To measure the size of the economy for informal music-making a focus was made on adult activity.

In economic terms, informal music-making can be described as that which happens when a group of musicians organise themselves to pay to hire a rehearsal space. This relatively simple act is the start of informal music-making in the social realm. It can easily be quantified in financial terms, demonstrating participants' commitment and value in collective making-

music. Such spaces do exist – music rehearsal rooms which operate on a commercial basis. The physical space, therefore, can subtly but rather obviously be defined by the activity that takes place in it, rather than the space defining the activity eg. badminton court, swimming pool, cinema, etc. Using this rather organic approach to define informal music-making falls in line with what Keith Negus purports: “...musical sounds and meanings are not only dependent upon the way an industry is producing culture, but are also shaped by the way in which culture is producing an industry” (Negus, 1999, p. 13).

The member’s understanding of where informal music takes place throws up a whole range of questions. If the DCMS, in its wider definition of the cultural economy, is seeking to support all phases of the production cycle, should an appropriate intervention and partnerships be developed with existing music rehearsal organisations who support informal music-making practices? Could such an intervention foster a new model that mixes learning with commerce and support the music industry at its foundation stage? Should public subsidy be directed to provide appropriate wider public access to this service? Would such support build clearer and more equitable progression routes for talented performers who go on to contribute to the UK economy? To come closer to quantifying the economic value of informal music-making in the public realm in London, data was collected on the turnovers and employment levels of commercial rehearsal/practice studios in London.

We have a £5 billion music industry that starts with unknown groups and artists performing in the back room of pubs. Without them there would be no multi billion pound industry. So let's give new and local artists a hand by providing them with somewhere proper to rehearse.

Feargal Sharkey, Chairman of the DCMS's Live Music Forum ¹³

6. Potential market size for informal music-making

The leading body for the commercial music industry, the Music Industries Association (MIA), in late 2005 commissioned an extensive survey into the music making habits of the UK¹⁴. It found over 21% of the UK population over 5 years old play an instrument, with 57% of them being under 35 years. The research also found it would appear that an additional 15.5m people wish to learn to play music.

In July 2005, *The Observer* newspaper published the results of a survey, *What is Britain listening to?*¹⁵, undertaken by the ICM Agency. It found more than one in four Britons play a musical instrument and among those aged 16-24 years, this figure rises to 44%. This music is likely to be based around an axis of guitar and piano/keyboards, as these are the most played instruments not simply by this age group, but by Britons in general. Similarly, in October 2005 a *YouGov* survey¹⁶ found 85% of Britons learnt to play an instrument as a young person but only 22% have continued, 45% of these are 18-29 year olds, 27% 30-50 year olds and 28% over 50 years. Of those who no longer play, 73% regret giving up and 33% would like to learn to play again. Within the schools sector, it is quite feasible that up to 20% of all London school children have played an instrument at some time. However, the 8-10% figure is probably more realistic for those who have had extended experience of two years or more (see Peggie, 2002, p. A-7).

In the professional music world, some 87% of all musicians perform pop, rock, country, folk, jazz, world and other music; the remaining 13% cover a mix of classical music, military bands, and musical theatre. The statistics on which full-time equivalence is calculated suggest those involved in the industry is likely to be near 200,000, with still more working as composers and songwriters, playing part-time, or working in education or training whom these statistics do not pick up (see Rogers, 2002, p. 8). Laing and York (2000)¹⁷ calculated that music employs over 55,000 Londoners - the equivalent of some 32,000 full time jobs, of which 13,350 are full-time jobs for musicians and composers. They also found Londoners

¹³www.culture.gov.uk/global/press_notices/archive_2006/dcms012_06.htm?month=January&properties=archive_2006%2C%2Fglobal%2Fpress_notices%2Farchive_2006%2F%2C

¹⁴ www.mia.org.uk/news/index.cfm?newsid=19

¹⁵ <http://observer.guardian.co.uk/omm/story/0,13887,1528542,00.html>

¹⁶ www.mia.org.uk/features/index.cfm?featureid=80

¹⁷ www.psi.org.uk/news/pressrelease.asp?news_item_id=9

spend around £128 million annually on musical instruments. London has a concentration of professional musicians, most of whom work in the popular music sector. Such critical mass would conceivably support an informal music economy.

Evidently the market for playing and owning a music instrument is significant (from above figures, between 20-25% of Londoners), but there is little research quantifying the prevalence of group music-making amongst 16-24 year olds and older, particularly in informal settings. Successful full-time rock and pop performers engaged on large scale tours and concerts have a national or international audience rather than a local one. Therefore they both have the finances to pay for rehearsals which are part of their professional life.

Uncovering what looks likely to be largely a hidden micro-economy of informal music would help to inform a policy to encourage greater participation in group music-making especially amongst lapsed players. Perhaps for many people if they had had what they perceived to have been more positive music-making experiences at school, they would be more likely to continue making music into later life. Participation in informal music may also have benefits in areas such as audience development, health promotion, cultural and social regeneration.

In many ways live music activity mirrors the structure of the recorded music sector. Popular music artists who sell hundreds of thousands of tickets, albums and singles, are at the top of the tree whose roots are formed by numerous bands who aspire to similar success. At the top of the business, pickings are rich indeed, but what of all the groups struggling to get on the ladder. Certainly in the most part, the record companies, national promoters and agents provide little help to these groups. Voluntary and amateur popular music musicians also constitute potentially a large market, but little is known in detail about the informal culture of participating in the creation and making of music.

6.1 The voluntary/amateur informal music sector

Before an analysis is made of the rehearsal room sector, a brief overview of national trends using previous research will help place informal music into a national context. Although somewhat dated, The National Music Council's *The Value of Music* report (Dane, 1996, p. 5) suggested the level of participation reaches at least 600,000 people who actively participate in amateur or voluntary music-making. This figure does not reveal the incidence of popular music-making. Three local studies give some indication of the prevalence of amateur popular music-making:-

- A study of musical life in Milton Keynes revealed that in the mid-1980s there were 100 functioning rock and pop bands in a population of 120,000 (Finnegan, 1989).

- The *Liverpool Echo* newspaper had undertaken a survey of the Merseyside region which concluded that Merseyside had more than 1,000 bands in a population of 1.48m (Cohen, 1990).
- In 1991 a survey in Leicestershire revealed that some 1,140 individuals were active in the county in rock and pop, of which 96% were semi-professional or amateur (Cummins, 1992).

The evidence from these three small-scale case studies suggest that between 0.27% and 0.33% of the population fall into the category of voluntary, amateur and semi-professional popular musician. These dated figures contrast strongly with the recent statistics from research carried out by the MIA, *The Observer* and *YouGov*. It would be interesting to investigate if there has been a strong growth in amateur/voluntary popular music-making? However, this could feature in future research. Clearly, music-making plays a significant part in the professional and leisure lives of many individuals.

It is undeniable popular music captures the imagination of young people: a variety of influences, methods and experiences impact on young people to inspire them to write, perform and record music. In the Arts Council of England's *Firestarting: A Scheme to support the infrastructure of Rock, Pop and Dance Music* (ACE, 2000) internal document, Graeme Wall, Music Officer, said: "Geographical and financial restrictions can make it hard to engage in ones chosen music in the essential first stages of learning, rehearsing, recording and gigging... A strong and vibrant independent scene is essential to maintaining an ever developing exciting music scene in England. Without it, contemporary music can become led more by market forces than artistic innovation."

There is strong evidence to suggest young people themselves demand an informal space where they can participate in music-making on their terms, but little research has been directed at quantifying the extent to which informal group music pervades our communities. Add to this its transient and unstable nature. An ex-regional representative for the Musicians Union, Alf Clarke, suggested that amateur rock and pop bands (at various stages of development) last no longer than three to four years (2000). The Nestle Family Monitor, as part of its *Make Space* Campaign, commissioned a report written by Kids' Club Network based on MORI and BMRB research findings¹⁸ of 605 young people aged 11-18 years and their parents. Its qualitative research indicated that both young people and parents complained of a lack of dedicated facilities for teenagers. Focus group respondents pointed out the most important element of the *Make Space Club* concept is an informal space for

¹⁸ www.4children.org.uk/information/show/ref/86

young people called the 'Chill Out Zone'. 46% indicated an interest in arts and creative activity at this facility with 67% of this group interested in music.

What we have seen over the last half-century is the triumph of a newly invented mass 'folk' tradition very close to people's lives where they view participation as important as performance. To assess the size of the economy of informal music in London a survey of the capital's music rehearsal organisations was undertaken.

...the great educational challenge and opportunity... We might then be expressing the shape of our own society, rather than reproducing the patterns of others.

Raymond Williams, *The Long Revolution: Education and British Society*, 1961, p. 176

7. Methods

There is no strategic overview of music education provision in London. Information about breadth of coverage, student numbers, vocational routes and support structures has not been centrally collected, and there is no common view of what musical opportunities should be offered or how they might be provided. While it would be useful to have gone some way to address this, this paper does not assess the artistic and educational benefits of informal music-making, but instead focuses on the related economic frameworks. Partly, this work aimed to explore the definitions and provenance of informal music, particularly in a group music-making context, rather than private and informal self-learning.

Firstly, qualitative, rather than statistical responses, were required to help identify a revised (if any) definition of informal music; and secondly, where it happens. Although there was little consensus agreement towards a definition of informal music amongst the focus group, this in itself illustrates the challenge. Identifying when it happens, especially in a public context and where there is an exchange of money, would at least help to begin to quantify the economic value of informal music, or more commonly known as, rehearsing.

This second part of this paper is not concerned with quality. It makes no judgement on the efficiency or otherwise of the activity quantified, and it does not suggest or apply evaluation criteria. Simply put, the paper takes the view that all kinds of music are valid means of engaging participant's interest and enthusiasm through informal music-making. A quick trawl through websites, publications and reports suggest there are six categories of music spaces.

Categories of music spaces:

- 1) Performance venues with learning and participation spaces eg. The Sage Gateshead
- 2) Community music spaces eg. Margate's Pie Factory
- 3) LEA Music Service & school music learning spaces eg. Kent Music's Astley House
- 4) Commercial training facilities eg. London School of Contemporary Music
- 5) Commercial rehearsal and practice rooms
- 6) FE/HE and conservatoires

One of the challenges of preparing a statistical account of informal music in London is the general absence of comprehensive official data. The problems of measurement in the cultural sector have been clearly expressed by academics and others (see, for instance, Brosio, 1994). The problem of measurement is not one which affects the cultural sector alone, it is evident in a multitude of sectors which have grown in the recent past, but whose growth has not been matched by consequent changes in classification at an official level. In addition, the music industry relates closely to a range of other industries where music is a significant component and this complicates the process of measurement.

The diverse nature of the music sector has necessitated a patchwork approach to undertaking the research. Utilising several different avenues of data collection within a particular area allows some validation of the accuracy of data. Six different approaches were applied:

- The use of existing published and unpublished data
- Data from official government sources and other public agencies
- Direct email correspondence with key workers (the focus group)
- Administered telephone questionnaire surveys undertaken by the author
- Interviews with key individuals working in music rehearsal organisations
- Other secondary source material such as existing publications, enquiries and reports

Within the activities identified above, an attempt was made to collect data on the following:

- Number of organisations known to be active within the music rehearsal sector
- Levels of employment
- Weekly usage/number of participants
- Turnover
- Length of existence
- Length of sessions
- Session charges

There are a large number of music organisations which function as independent business units, some subsumed within the activities of other businesses. Some form an integral part of the operation of recording companies and, consequently, the finances and employment attributable to the rehearsal element are difficult to separate.

The supply of musical instruments to both professional musicians and amateurs is a significant core sector of the music industry. The sector is represented by the Music Industries Association (MIA) which collates data on the value of retail sales of new musical instruments. There is also a considerable market for second-hand instruments. The hire,

maintenance and repair of musical instruments are also significant parts of the overall business. I have not attempted to quantify this other than what has been described in the previous chapter, but acknowledge that this sizeable industry in London is integral to informal music-making (but it is not music-making per se).

In practice it is often difficult to measure the value added (net profit) of an industry directly since this requires not only a measurement of output (turnover) but also a measure of all the inputs which need to be deducted from turnover to arrive at value added. Turnover alone is a poor guide to the economic importance of an industry since this will depend on the value of inputs; in aggregating turnover for an industry such as music, where the output of one part of the industry is the input to another, there would also be substantial double counting. However, as it turned out, there was generally great sensitivity from survey respondents in imparting financial information. Many of the respondents are small and medium-sized businesses, in some case struggling to survive. Competition is probably intense, and with the likelihood that most of the respondents constituted as sole traders, they are not obliged to divulge such information under accounting and legal requirements. It is therefore, a testament to those who did respond, to their goodwill. I determined that collecting turnovers was more a reflection of the collective financial commitment from music-makers, professional or otherwise, to informal music-making. An assumption was therefore made that the estimated consolidated gross incomes equated to consumer spending on informal music-making in rehearsal rooms.

Largely speaking there are better equipped and larger rehearsal rooms situated in major cities where most of the work for groups takes place. So to gain a wider picture of the informal music-making economy a look at London's music rehearsal room sector was undertaken. A survey of existing "informal" activity was carried out by telephone using an administered questionnaire (App. 3) developed from the definitions and descriptions provided by focus group members. The target group were managers of commercial music studios and practice rooms listed on yell.com in London and in the *Music Week Directory*.

8. Results

115 music rehearsal organisations listed within the 33 boroughs of London (incl. City of London) were contacted. The response rate is outlined in Table 4:

Response	Number	%
No response	37	32%
Positive response	27	24%
No information available/confidential	20	17%
Recording studio only	18	16%
Closed	9	8%
Dance rehearsals only	4	3%
TOTAL	115	100%

Table 4: Response rate from London music rehearsal organisations

There was no answer to the telephone call for 37 (32%), despite several attempts over six consecutive days (Thur – Tue in mid July). 27 ‘positive responses’ (24%) were obtained while information was either not available or confidential from a further 20 (17%). 18 (16%) only offered a music recording service, while 9 (8%) had closed and 4 (3%) turned out to be dance rehearsal studios. Unlike the ‘positive responses’ which were open every day (hence answering the telephone call), an assumption was made concerning the ‘no responses’ as either a private facility or closed, leaving a total of 47 actual music rehearsal organisations with a pre-booking facility available to music-makers. This left an improved response rate of 57%. There was a total of 196 individual professional rehearsal rooms in London in July 2006 (run by the 47 ‘positive responses’) ranging from 2 to 14 spaces per music rehearsal organisation.

8.1 Turnovers

Due to the business sensitivities, the question of turnover was banded to encourage a 'positive response'. These are outlined in Table 5:

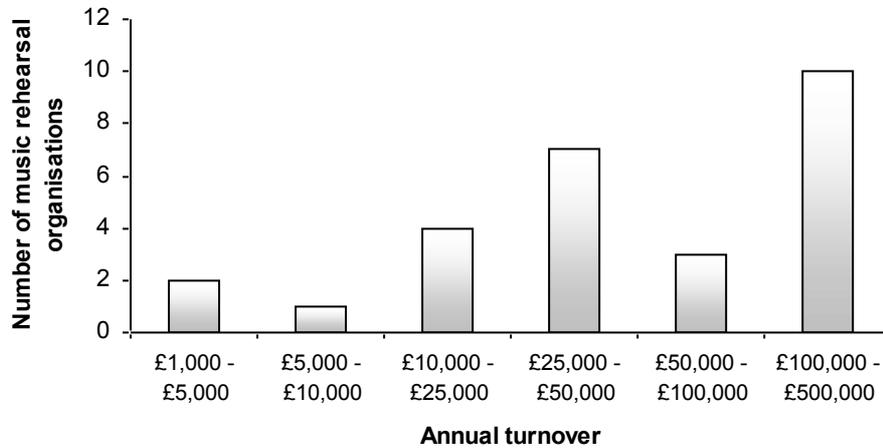


Table 5: London music rehearsal organisations banded by turnover

There was little evidence of public corporation or government spending (apart from Goldsmiths College). There were a few examples of record company (corporate sector) spending. 37% had turnovers of between £100,000 - £500,000; 11% between £50,000 - £100,000; 26% £25,000 - £50,000; 15% £10,000 - £25,000; 4% £5,000 - £10,000; and 7% £1,000 - £5,000. The concentration of turnovers was in the upper bands. This suggests, rather obviously, that to financially sustain a music rehearsal organisation by earned income, larger turnovers (£100,000 and above) are optimal. Those with higher turnovers are more likely to be limited companies for legal and tax accounting reasons, therefore more likely to divulge their turnovers because this information is publicly available via Companies House.

8.2 The size and capacity of the informal music-making sector

Music rehearsal organisations were much more forthcoming about their session/hourly rates and daily capacity than their annual turnover. Therefore to determine an estimated consolidated economy of London's commercial music rehearsal sector a more accurate calculation was carried out for each respondent using the following calculation:

Number of rehearsal music rooms multiplied by daily session capacity multiplied by session/hourly rate

44 out of the 47 (nearly 94%) answered these questions. All music rehearsal organisations offered variable hire rates according to what was provided (although not all provided all of them) out of the following:

- Size of room
- Time of day
- Weekday or weekend
- Block-booking discounts
- Whether equipment and/or instruments were supplied/hired
- Some had a technical employee on hand

Each facility was asked the lowest and highest hourly rate/session rate. From this an average hourly rate for each facility could be determined (session rates were divided by the session length which gave a standardised hourly rate). Hourly rates by average ranged from £5 at Abbey Music Studios to £30 at English National Opera’s Rehearsal Studios giving a mean hourly rate to hire a music rehearsal space in London at £10.

Using this formula gave a daily capacity in terms of earned income. The daily capacity was multiplied by 7 days (1 week), multiplied by 52 weeks which gave an annual capacity for each of the 44 (94%) music rehearsal organisations. Of course, not all music rehearsal organisations work at full capacity (although some rooms are hired permanently to record companies for use by their artists), so a parameter of 50% and 90% capacities (with degrees of 60%, 70%, 80%) was used to give a range of the likely consolidated economy of the informal music-making sector in London (table 6). As an estimate, music rehearsal organisations work at 75% of their full capacity. This gives an estimated consolidated economy of the informal music-making sector in London of £9.3m per annum based upon the total value of consumer spending.

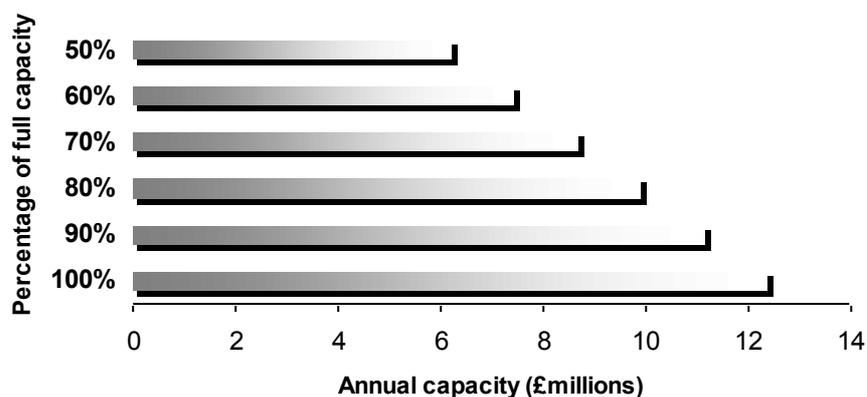


Table 6: Consolidated economy of London’s music rehearsal organisations by capacity

8.3 The rate of music rehearsal organisations established in London

41 respondents answered the question when they were established. There had been a steady increase in their number since 1976 at a rate of nearly 3 new organisations

established every two years, not accounting, of course, for the number that ceased trading during this period (see table 7).

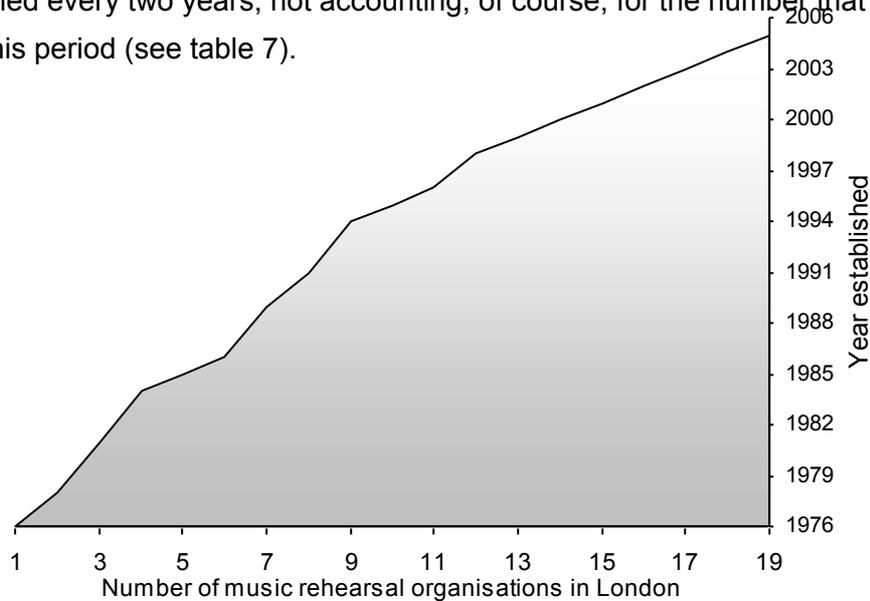


Table 7: London's music rehearsal organisations established over time

8.4 Annual footfall

42 of the 47 'positive responses' (89%) gave answers to weekly usage listed in bands of number of individual users (music-makers):

- > 0-50 people
- > 50-100 people
- > 100-150 people
- > 150-200 people
- > 200 people and over

Some were able to give much larger numbers than the largest banded capacity, for example Enterprise Studios stated that on average it had 1,000 music-makers through its doors each week. This gave an annual number of individual visits (footfall) to London music rehearsal organisations of 380,000 (of course many are repeat visits). It is worth noting here, the average number of musicians in beginner pop/rock ensembles is 3.9 members (Hallam et al, 2005, p. 44).

8.5 Employee numbers

The same number (42) of respondents answered the question of the number of employees. In total there were 119 full-time employees (many of this number is likely to include the owner/Director) and 104 part-time employees working in commercially-run rehearsal rooms

in London. Some respondents said employees worked on a freelance/self-employed basis, suggesting these staff sub-let the spaces.

8.6 Geographic location by borough

15 local authorities in London had a music rehearsal organisation located within its borough (45%) (see Fig. 2). A comparison with non-metropolitan boroughs was not made. Over three quarters (77%) of their geographic distribution was weighted in favour of Inner London, and the pattern of their establishment was not so much strategic as opportunistic – in the manner of restaurants clustering together in certain neighbourhoods.

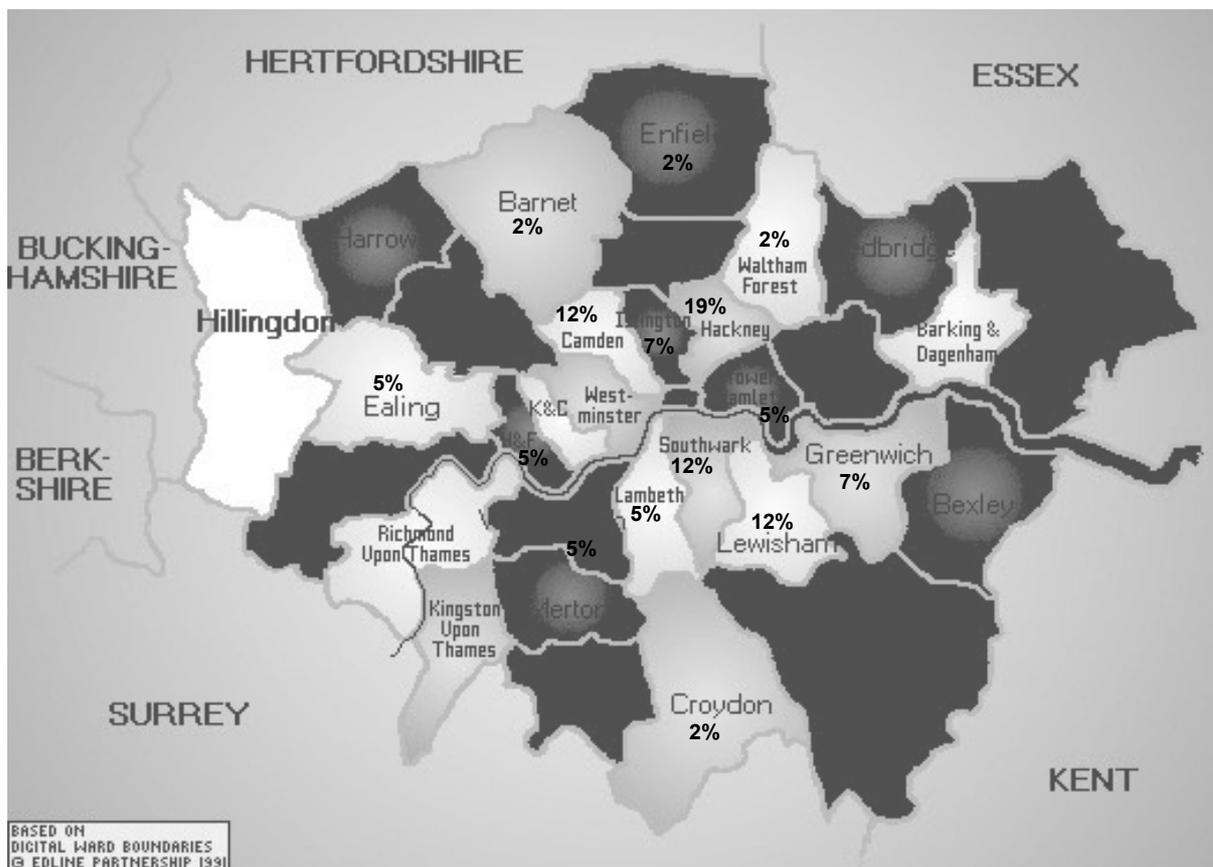


Figure 3: Map of London boroughs with percentage share of all music rehearsal organisations

A further analysis was made against each borough's Rank of Deprivation Extent from the Department of Communities and Local Government's website¹⁹ out of 355 English boroughs.

¹⁹ www.communities.gov.uk/odpm/SOA/LASummaries2004.xls

Local Authority area	Number of organisations with rehearsal rooms	%	Borough's Rank of Deprivation Extent	Inner / Outer London borough
Hackney	8	19%	1	inner
Southwark	5	12%	13	inner
Camden	5	12%	21	inner
Lewisham	5	12%	77	Inner
Greenwich	3	7%	41	Inner
Islington	3	7%	3	Inner
Hammersmith & Fulham	2	5%	79	Inner
Lambeth	2	5%	22	inner
Tower Hamlets	2	5%	2	Inner
Ealing	2	5%	105	outer
Wandsworth	2	5%	155	Inner
Waltham Forest	1	2%	59	outer
Barnet	1	2%	175	outer
Enfield	1	2%	109	outer
Croydon	1	2%	139	outer
TOTAL	43	100%		

Table 8: Location of music rehearsal organisations in London according to borough and rank of deprivation extent

13 music rehearsal organisations (30%) were located in the three highest deprived boroughs in England, suggesting locating such facilities in more deprived areas was more attractive to small cultural businesses (depressed building prices, concentration of cheaper housing for artists, areas of social and economic regeneration, etc).

8.7 The economic value of music education in London

From the data collected, the consolidated annual economies for the formal, non-formal and informal music education sectors in London can be illustrated in table 9.

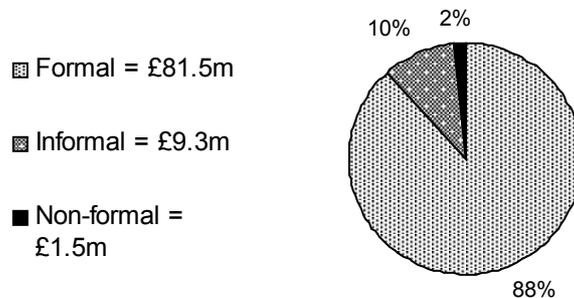


Table 9: Consolidated annual economies for the formal, non-formal and informal music education sectors in London

Music has the power to change moods and attitudes... A lot of popular music is just a reaction to the social environment. The more important music will change that environment.

Lanza, Joseph – *Elevator Music*, 1994, p. 231

9. Music Spaces – discussion

'The Space' is where it all happens – the performance, the workshop, the rehearsal, even the brain. Unfortunately, The Space can often be overlooked in favour of the creative process. A good space enables and nurtures the artistic process. It helps people to feel comfortable, encourages freedom of expression and is defined as part of the learning contract as a safe place. Many music organisations provide opportunities to rehearse and learn music that has to be compromised in order to fit the venue and space for a number of reasons, not least financial. This, then, would suggest the audience who come to behold are being cheated of a more rounded experience. It is interesting to note that from a technical perspective, both music and instruments as we know them in the West today have developed in a very specialised way: "...in particular, the orchestral and chamber music is developed from that played in rooms of large houses in the Europe of the Seventeenth and Eighteenth centuries. The original acoustics has defined the music – and that music now, in turn, defines the acoustic needed for it " (Nisbett, 1995, p. 41).

There are many existing models of professionally equipped music spaces in the public sector attached to concert halls, arts centres, conservatoires, FE & HE colleges, youth centres, schools, music centres, etc, but these often involve a pedagogical approach to what the *Music Manifesto* describes as formal and non-formal music-making. Public access can also be limited. This raises the question about the variety of rehearsal and production settings where informal music-making takes place. The amateur and ostensibly private informal music sector is characterised by the back rooms of pubs, homes and garages which remain unsuitable and poorly equipped rehearsal spaces with the added annoyance of:

1. Environmental complaints from nearby residents of noise pollution
2. Bad parking and semi-inaccessible rooms
3. No storage facilities
4. Cold, draughty and damp rooms

Definition of a music rehearsal space

A music space is a dedicated acoustic environment. This can be defined in terms of its purpose and layout, its acoustics and treatments used to modify them, and its furnishings. This space is designed to keep sound inside and often has a PA system and microphones.

Music spaces vary according to the economic needs and the size of the community they serve, and to their system of financing. Some must necessarily be for general (and perhaps limited) purposes, whereas others may specialise.

The cost of running music rehearsal spaces is such that their number can be supported by any given population is limited. With a smaller population it may be difficult to sustain this number: there may be only two rehearsal rooms or even one, jeopardising its very survival.

Adapted from Nisbett, 1995, p. 34

5. Dangerous electrics, poor lighting and bad fire precautions
6. Poor acoustics
7. No refreshments
8. An atmosphere at odds with fostering talent
9. Poor access to networking, training and progression routes to develop skills
10. Sense of isolation and limited opportunities for social and business exchange

Once a group has found a satisfactory and affordable rehearsal space they are perhaps likely to make a regular booking (perhaps taking up a block booking discount scheme). This is also good practice as regular rehearsals disciplines the music-makers before performing live. Indeed, money earned from performing will go towards paying to hire a rehearsal space. Of course, groups who play together for any length of time find a group style and empathy. As Cornelius Cardew said: "Training is substituted for rehearsal, and a certain moral discipline is an essential part of this training" (Cardew, 1971, p. xviii). Playing music of one's choice, with which one identifies personally, with like-minded friends, and having fun doing it must be a high priority in the quest for increasing numbers of young people to make music meaningful, worthwhile and participatory.

Peggie has highlighted however the tensions between the need to load music with educative possibilities (in formal and non-formal music education) and engaging in the essential cultural activity of making music together for its own sake. Such engagement, apart from offering cultural opportunities, can also provide the spur to the wider regeneration of a neighbourhood or an estate informing: "the regeneration of whole areas... the conclusion of Comedia's work... is that by far the best way of getting social regeneration off the ground in a neighbourhood or a town is to start with cultural regeneration" (Smith, 1998, p.134). Much cultural regeneration is currently seen in the context of the democratisation of the formal teaching pedagogy, driven by arts organisations seeking work for its artists and employees.

The wide range of musical genres within the music industry presents education and training institutions with choices relating to the scope and diversity of the courses they offer. The education needs of different genres, and the artistic expression within a genre, may require different patterns of organisation. For the music education sector to assume greater responsibility for the whole range of training needs, a collaborative approach will be required on the part of individual institutions: "This would mean the ready availability of facilities,

Case Study 3: Keith Negus

A number of us had made the transition from back rooms and bedrooms to performing regularly in pubs, community centres, youth clubs, parties and then more recognised venues. I had become a participant member of a passionate, competitive yet convivial and somewhat idiosyncratic music scene.... After stints in numerous bands, I ended up performing with the lesser known and more embarrassingly named Coconut Dogs, who released a couple of singles and played numerous clubs, bars and provincial venues before sinking into ever deeper obscurity.

Keith Negus in *Music Genres and Corporate Culture*, 1999, p. 2

expertise and funding. Such opportunities and resources must also be on hand for professional enrichment throughout a musician's career" (Rogers, 2002, p. 11).

9.1 The regeneration context

Matarasso asserts when arts activity takes place in a regeneration context that: "...arts work has provided groups with an opportunity to think about their rights and social responsibilities" (Matarasso, 1997, p.vi). But whatever their social or economic situation, people do, and always will, develop their own creative resources: they need support and access into wider cultural and civic discourse. As Dilys Hill concludes in her study of urban policy and citizenship: "The argument is not that people must or will be involved, but that means should exist to ensure that they can" (Hill, 1994, p.249).

Jorn Langsted has suggested that a cultural policy that crosses various administrative boundaries could comprise elements which normally belong in the category of social services, school administration, town planning, etc. to a great extent: "Such a policy will consist in creating a cultural infrastructure by procuring accommodations, workshops and studios for cultural activities" (Langsted, 1990, p. 18). Explorations of the relationships between the environment and leisure are now central to a wide range of research agendas across the social sciences. Increasing concerns about sustainability, community development, social inclusion, urban regeneration and rural renaissance have focused attention on the ways in which we plan and manage leisure environments. But making space for leisure has become an increasingly contested terrain where our demands on the environment have frequently outstripped the supply of resources. By making space for leisure opportunities far reaching and sustainable social, cultural and economic benefits can be developed for individuals, communities and wider society. The subject fields of planning, architecture, public and social policy, transport policy and heritage studies have also all begun to address the need to consider issues of the spatiality of leisure and tourism.

9.2 The skills agenda

The means to ensure music-making opportunities should exist, falls across many Government policy areas, rather than the commercial music industry. For the music industry is concerned mainly with maximising profits, rather than wider access. The Sector Skills Council for Music, part of Creative & Cultural Skills, is an industry-led organisation promising to influence the supply of education and skills across the UK²⁰. It has identified many of the music industry sub-sectors, but not the music rehearsal sector. Although it may not be a sizeable economy against other sub-sectors, nonetheless, it warrants greater acknowledgement to reflect its importance in feeding product to the other sub-sectors. Whereas the DCMS sponsored *SME Music Businesses: Business Growth & Access to Finance report* in April 2006²¹ was explicit in identifying the 'Music studios and practice rooms' sector as one of 11 sub-industries. Are we to conclude the music rehearsal sector does not provide skills development but is simply a business opportunity?

The music industry is dependent on a large number of specialist companies engaged almost exclusively in activities within the music industry. However, unwittingly, music rehearsal organisations are concerned with talent development. As most of these companies are small, their overall economic significance goes unnoticed, over-shadowed by the massive economic force of the corporate record companies. With any other industry, a closer look can reveal the inherent intricacies and inter-dependencies. *A Review of Music in the Northern Arts Region* report recommended that in the contemporary popular music area that: "Northern Arts should leave the recording business to the commercial marketplace"²². But that is to, as Negus has found: "gloss over a series of significant differences of form, content, production, consumption and social mediation" (Negus, 1999, p. 22). Market failure is more obvious where: "... access to recording studios and rehearsal space are completely beyond most teenagers' pockets... [which] do their best to redress the situation, but they have to struggle against inadequate funding" (Everitt, 1997, p. 50).

Meanwhile, the demand for the traditional recording studio space has waned with the advent of affordable home computers and accessible software. In researching this paper the Chair of the Association of Professional Recording Services, Simon van Zwanenberg, indicated:

"The advance of the technological revolution has increased the pressure on professional studios... Manufacturers, of course, are continually

²⁰ www.ccskills.org.uk/industries/music.asp

²¹ www.culture.gov.uk/global/publications/archive_2006/music_surveyreport.htm

²² Cultural Industries Research Unit, Centre for Urban and Regional Development Studies, University of Newcastle-upon-Tyne, p. 36, 1995 – *A Review of Music in the Northern Arts Region*

seeking new markets for the technology they produce and, understandably, as the home studio and individual composer, musician, producer market has grown in importance, financial forces take over. This has impacted on professional studios... because the end product can be written, played, recorded and mixed for £2.50 in the fully equipped bedroom/garage.”

Everitt argues that why participatory musics are disparate, fragmented and under-resourced, it is the lack of appropriate well-funded institutions which can offer space, equipment, instruments and (most important of all) meeting places where amateurs and professional can exchange ideas and practice (Everitt, 1997, p. 17). Schools have for a long time played a major role in the development of popular musicians through the provision of resources such as rehearsal spaces and instruments, formal and informal performance opportunities and, most particularly, large numbers of young people with shared musical interests. But Green has argued: “...this input by the school traditionally occurred almost entirely outside the classroom ...largely unsupervised and often flew in the face of the music department’s ethos” (Green, 2001, p. 146).

Everitt posits the idea that if schools were furnished with freely available instruments, facilities and dedicated rehearsal and practice spaces and open to use by the local community, children will find it easier to make the imaginative and practical link between school work and music-making in the world at large, helping to ensure they maintain their musical interests after leaving school: “In the course of time this could lead to a national network of institutions which would stabilise and enrich a creative activity that is both massively popular and massively under-financed” (Everitt, 1997, p. 100). Indeed, we have seen a number of policy initiatives along these lines eg. Performing Arts status schools, Spaces for Sports & the Arts, Extended Schools, etc.

9.3 A sports analogy

Perhaps an analogy can be made here. The route from voluntary sports activity to professional sports persons has for the past 20 years not just been acknowledged but actively supported by local authorities. Investment in local amateur sports clubs is seen as an investment in athletes of the future at both local and national level. Local Authority’s have the choice of the level and range of recreation provision and how well they work in partnership with others. They have powers, under the Local Government Act 2000, to secure the economic, social and environmental well-being of their residents²³. Practically in every borough there are affordable high quality spaces with a menu of sports, including

²³ www.audit-commission.gov.uk/reports/accessible.asp?ProdID=3CC48D79-9F95-40cf-80BA-1BD14E044A43

progression routes to professional activity and homes to community and voluntary groups. The mixed economy (public funding and earned income) that supports the running of a sports centre could offer a useful model in measuring the market demand for music participation, learning and further development.

Sport is rightly seen as a public good which promotes health, confidence and teamwork, while enriching society as whole. Informal music-making too has a key role in health improvement, social inclusion, regeneration, community safety and educational achievement: “A social policy or community development strategy which ignores this is simply reducing its potential effectiveness by a substantial margin” (Matarasso, 1997, p.83). Should there be a similar intervention for music-making, especially when the music industry adds so much to the UK economy? This is an interesting suggestion, and perhaps worthy of further work beyond the scope of this paper. Making spaces for informal music-making within the community have far reaching implications for social and cultural policies.

When you write a song, it's a song until you get into the rehearsal room. Then you get into the studio, into the details...

David Sylvian

10. Conclusion - Spaces for informal music-making

Development within the cultural domain is characterised by the fact that the new post-war middle classes have increasingly become the bearers of culture. Langsted has argued: "... subcultures have evolved, ie. a children's culture, a youth culture, a women's culture, local community cultures... The growth of these new classes has, in general, caused society to become more obviously pluralistic – which in turn affects cultural needs" (Langsted, 1990, p. 19-20). So too have bands and groups of all types become the focus of enthusiasm for many young musicians, often when still at school. But Paul Willis has found that: "Even rock music, which was expected to be associated with working-class cultural creativity, was often found to be more accessible to those who had benefited from middle-class upbringings which offered the resources and positive attitudes to encourage musical and artistic involvement from an early age" (Willis, 1990, p.50-51).

As an economy we place value in popular music, directly and effectively, by heaping cash upon the heads of those who make it but: "Collectively, we do not part with our cash anywhere near as readily for the products of the established canon which therefore need vast public subsidies in order to survive" (Paton, 2000, p. 6). "It is thus necessary," says Attali, "to imagine radically new theoretical forms, in order to speak to new realities... The available representation of the economy, trapped within frameworks erected in the seventeenth century or, at least, toward 1850, can neither predict, describe, nor even express what awaits us" (Attali, 1977, p. 4). Owen Kelly goes further: "Our arts policy is still based on a theory of 'trickle down': the idea that if we provide arts for the elite, cultural improvement will gradually drip down to the masses. It is a theory we have long since rejected in the economic field, and we should reject

Case Study 4: Wrexham

The Welsh Music Foundation, Live Music Forum and Musical Industries Association set up a new rehearsal room in Wrexham in January 2006. The studio is part of the Live Music Forum's (LMF) project to encourage Local Authorities to provide rehearsal rooms in their unused buildings.

The studio is free to bands who are under 18 and in education. There is a small charge of £3-4 an hour for all other bands, which go towards repairing and maintaining the equipment. The equipment has been supplied by Music Industries Association members. PLASA has provided £3,500 towards building work on the room. The Welsh Development Agency has provided a grant of £17,500 to staff the project. Wrexham Council have provided the space rent free in its Victoria Youth Centre, and £1,500 towards the construction costs and supplied the equipment for the small recording studio based next door to the rehearsal room.

Project Manager for the Welsh Music Foundation, Andy Williams, said: "Wrexham council have supplied a large space in the centre of Wrexham. This is a very exciting development, which will assist the area's music scene, as rehearsal rooms have consistently been shown to be effective in stimulating music production in areas where they exist. The space will not only have a rehearsal room but will also have recording facilities, small performance area and a cafe, and will not only be an excellent space for bands to rehearse, but also a creative meeting place for local musicians... There are also plans to co-ordinate training and teaching events with top level professional musicians giving lesson in both technical and artistic areas."

www.welshmusicfoundation.com/press/433750715eng.php
www.culture.gov.uk/creative_industries/music/livemusicforum.htm

it in the arts field too” (Kelly, 1997, p.24). These assertions have far reaching implications for arts and music education policies.

For advances in medicine, access to public health and healthier living have resulted in declining fertility and increasing longevity, such that by 2008 around half the UK population will be over the age of 50²⁴. Trends are already showing that in the coming decades more time and money will be spent by those over 40 on leisure and recreation – and not just on TV, radio and ‘resting’ activities. Everitt has argued: “Rock and pop are generationally defined and closely associated with a distinct youth culture; but this is less of a limiting factor than it used to be, for 40 years on those who grew up with the rock and pop ‘revolution’, although now ageing, have seldom abandoned their early tastes” (Everitt, 1997, p16).

As a result, music-making will come to play a huge role in utilising the wisdom and potential of this older society in both creating and fulfilling the demand for more meaningful activities. The next generation of ‘older people’ will be the ‘baby boom’ generation in need of somewhere to make music. Demand for access to informal music spaces may also alter, relative to current opportunities to participate at arts centres, evening classes and sports centres. How should public policies respond to these demographic changes.

It is increasingly recognized the economic and social challenges of the coming century will favour those cultures which are flexible and risk-competent: “It is not easy to generalize about these, since they are individual and often private, but overcoming them is a major source of confidence and growth” (Matarasso, 1997, p.62-63). Chris Smith agrees: “...governments can ensure that the framework is in place that permits those creative impulses to flourish, and can ensure that as many people as possible have the chance to enjoy and absorb” (Smith, 1997, p. 5).

But in considering equal opportunities issues we cannot simply lump all music together... “it is not the sound, so much as the attributes of the musicians and audiences, that provide the starting point for these definitions....It is the varying attitudes to music making that educators need to take into account in aiming to be inclusive” (Peggie, 2002, p. 7). One explanation why conflicts of interest exist within the different music education providers is because few appear to have taken the time to examine

Case Study 5: Weekend Warriors

The Weekend Warrior programme was brought to the UK from the US by the Music Industries Association (MIA). It gives older lapsed musicians a unique opportunity to re-join a band and re-live their musical youth.

Weekend Warriors was started in the US in 1993 by Skips Music and taken up by North American Music Association. The programme is now run throughout the US and, through the Australian Music Association, in Australia.

In the UK 20 MIA shops manage the programme which provides local musicians with equipment, rehearsal space and a mentor to help them work towards a gig in front of family and friends.

www.mia.org.uk/events/index.cfm?eventid=31

²⁴ www.esrc.ac.uk/ESRCInfoCentre/facts/UK/index8.aspx?ComponentId=6991&SourcePageId=14975

the various ways young people get hooked on music in the first place: “This clearly has consequences for those of us who wish to encourage democratic participation in cultural production and broad access to the products that are made available” (Negus, 1999, pp 175-176). The main concern then: “...is not whether music is ‘beautiful’ or ‘well-structured’ or ‘profound’ but whether it belongs, whether it resonates directly with the lives of those who are making it” (Paton, 2000, p.17).

10.1 A way forward

The Government has begun to acknowledge the importance of placing empowerment in young people in one of its recent initiatives. The DfES *Youth Matters* Green Paper²⁵ states: “Our first challenge is to put young people themselves in control of the things to do and places to go in their area... We propose to establish a line of capital funding of £40 million over two years from April 2006 to enable Local Authorities to develop, in conjunction with young people, new approaches to strategic investment in youth facilities” (p.5 & 6). Although it is difficult to know what activity will take place in such spaces, the intention is that they will be designed to give a sense of place and foster a sense of ownership, leading to community cohesion. Indeed, Arts Council England admits: “Ownership or control of a building is perceived in the arts as ‘growing up’. Talawa Theatre company’s achievement in becoming the first major Black building-based theatre, housed in the Jeanetta Cochrane Theatre in London, has been seen as a major development in Black arts” (Arts Council of England, 1993, p.117-118)

While there may be ‘grown-up’ commercially-run rehearsal spaces in urban areas, this research indicates they do not however run structured training, outreach or strategic inclusion projects. Peggie puts forward the suggestion that music education providers: “inhabit the gaps between formal education, arts provision, community activity and the commercial world. A few operate entirely as commercial enterprises. [They] are thus ideally placed to make connections, providing a complex, multi-dimensional lattice of opportunities” (Peggie, 2002, p. 10). Many schools too have extended curricular activities where pupils take part in a variety of musical groups including brass bands, string ensembles, rock bands, steel pans, choirs or a whole school orchestra. But Peggie’s research highlighted “...[that] there needs to be a network of resources with minimal adult intervention through which young people can take ownership of, and create identity with, music which does not commit them to established progression routes or long-term relationships dictated by remote orthodoxies” (Peggie, 2002, p. 19).

²⁵ www.dfes.gov.uk/consultations/downloadableDocs/Youth%20pdf.pdf

The Mayor of London's cultural strategy comes close to supporting this idea²⁶. It states: "investment and support [is] to be focused on local 'creative hubs'... They will build on successful initiatives that are already taking place, encourage the growth of networks, and in most cases will include a property or properties that provide space for work, participation and consumption". Elsewhere, Andrew Davies, Minister for Economic Development in Wales, has also found that: "These rehearsal rooms represent the beginnings of a Music Hub; not only providing a place for musicians to interact and exchange creative ideas, but generating considerable benefit for the local music scene and the local economy"²⁷.

Although music education has made great strides in broadening its offer, the pedagogy has changed little. If Music Services were to be subject to a more integrated approach from local authorities, combined with a more entrepreneurial approach inherent in how music rehearsal organisations run themselves, not only will their income streams diversify, but perhaps there will be more opportunities for informal music-making. Such connections made between school life and the community has the potential to make explicit equitable routes by which true talent can navigate to wider audiences. By better understanding how the informal music-making economy works in London will at least legitimise a rewarding pastime if nothing else.

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²⁶ www.creativelondon.org.uk/upload/doc/London_City_Profile.doc, p.4

²⁷ www.culture.gov.uk/global/press_notices/archive_2006/dcms012_06.htm

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