



# SECURING OUR **TALENT PIPELINE**

**TALENT  
PIPELINE** 



## HOW CAN WE SUPPORT OUR FUTURE MUSIC TALENT PIPELINE?

The UK music industry is doing well. Last year, it grew by 6 per cent and is now worth £4.4 billion to the economy - with the live music industry contributing around £1 billion.

Successful acts like Ed Sheeran continued to help exports soar by 13 per cent to £2.5 billion. His third album ÷ (Divide) was the biggest selling album in the world in 2017. This is the third time in the past five years that a UK artist has achieved this accolade.

The creative industries as a whole are growing at twice the rate of the wider economy and are now worth £92 billion to the UK. According to The Soft Power 30, the UK is number one in the world in terms of cultural soft power.

But when things are going well, that is precisely the time to think about what we need to do to protect this success for the future.

Whilst the immediate outlook is good, there is growing evidence of significant problems in the music industry's talent pipeline.

According to Pollstar magazine, UK acts Coldplay, Depeche Mode, Sir Paul McCartney, Ed Sheeran and the Rolling Stones all featured in the top ten worldwide tours last year. A fantastic achievement but all but one of these five acts released their debut single in the last century.

A UK Music analysis of major UK festivals over a 20-year period indicates an act headlining the likes of Glastonbury or Reading in 1995 can, on average, expect to have released their debut album 7 years previously. Nowadays, it's more like 16 years. The average ages of headline acts has also risen.

It is important that established artists continue to make music and inspire fans, yet if we want to produce the stars of the future, we've got to invest in talent for the future.

We are a nation that has a natural musical talent with education, infrastructure

and finance all playing an important role in unlocking careers. However real obstacles in each of these areas do exist.

Evidence in research suggests there is an overall decline in music in education. According to a recent UK Music survey 17 per cent of music creators were educated at fee paying schools, compared with 7 per cent across the population as a whole. This matters because 50 per cent of children at independent schools receive sustained music tuition, while the figure for state schools is a mere 15 per cent.

On venues, 35 per cent of music venues have closed in the past decade, significantly reducing the chances for up and coming musicians to develop their skills in front of audiences and grow fan bases.

On access to finance to pursue a career in music, UK Music's recent survey of music creators also revealed that 46 per cent received financial help from family and friends at some point in the development of their professional career.

Google's YouTube needs to do fairer deals. At present, creators can expect to receive as little as £0.00054 per stream from the service.

These are just a few snapshots of the challenges creating a blockage in the music industry talent pipeline. This report focuses on creative talent yet the recommendations put forward will contribute to the development of the workforce as a whole.

It is important that the Government plays a key role in working with the music industry in overcoming this. Collaboration is vital. If we don't work to fix the blockage in the talent pipeline now, we will remain stuck.

## MUSIC IN EDUCATION

According to the Cultural Learning Alliance, participation in structured arts activities can increase cognitive abilities by 17 per cent.

Musical skills need be nurtured at the earliest opportunity. This needs to begin at primary school and play a significant part in continued curriculum learning.

However, music provision in state schools – where 91 per cent of children are educated – is in marked decline.

The latest GCSE results revealed a 7.4 per cent drop in the number of pupils taking the subject despite overall GCSE entries increasing by 0.2 per cent in the 2017/18 academic year.

This follows an 8 per cent drop in the 2016/17 academic year. One fifth of schools did not offer GCSE Music that year. Of those that did 11 per cent were taught outside curriculum time.

In 2010 the EBacc, which excludes creative subjects such as music, was introduced. A total of 59.7 per cent of state schools say it has had a negative impact on music provision and uptake, according to a study conducted by the University of Sussex.

Provision of Music GCSE in a school creates the culture for the school to embrace music and provides talent and equipment in-house to allow many forms of music-making to emerge and be supported.

Beyond GCSEs, the number of schools offering pupils a chance to study BTEC Music Level 2 has declined by 70 per cent over four years.

Reduced access to music in state education is leading to an inequality of opportunity. Music has a key role to play in enabling social mobility. Top earners are four times more likely to pay for social-enrichment classes for their children. 50 per cent of children at independent schools receive sustained music tuition, whilst the figure for state schools is only 15 per cent.

The drop in the number of children involved in music in schools not only

diminishes our culture, it also damages our education system as a whole. There is evidence to suggest that children who are engaged in education through music, as is the case with other subjects like drama and sport, do better at their maths and English.

Music must not become a neglected side-line within the 21st Century education system. Unless this decline is reversed, the talent pipeline that we hope will produce the next generation of stars to follow Adele, Ed Sheeran and Stormzy will suffer a major blow.



## THE SOLUTIONS

The Government have committed £75 million annually paid directly to Music Education Hubs to deliver on the National Plan for Music Education to provide music services for children and young people. However, there is no clear plan in place for them after 2020. The Government must commit to a new plan by the end of the year, building on further research being conducted by the Musicians' Union and UK Music. The plan should be properly costed and address the continuing issues regarding consistency to access, equality and opportunities across the country.

Music Education Hubs should be required to be more accountable to local stakeholders. The data they are required to collect can be more relevant and robust.

The original vision of the Plan to engage with schools needs to be addressed. The education landscape is very different to what it was in 2011 yet this relationship is crucial in ensuring children and young people have a joined up approach to their learning.

Access to a broad and balanced curriculum is key for creative learning. Cultural subjects like music must not be allowed to be squeezed out of our state schools. This should be at the heart of improving young people's access to music making from early years through school and onto further and higher education, as supported by UK Music's Music Academic Partnership (MAP), and lifelong learning. The approach should be consistent throughout the sector and it must be a key objective for a future revised National Plan for Music Education.

There is an opportunity in a future National Plan to address issues

such as the way young people engage with music making now, including an increased use of music technology. There should also be an increase in the sharing of good practice and innovation when working with students in challenging circumstances and supporting students with additional needs.

A skilled and supported workforce delivering this work is of course critical and the next National Plan needs to fully address the current challenges that Music Education Hubs face in engaging music educators properly in times of cuts to budgets in schools and local authorities. More creative solutions need to be explored to ensure that the best educators are still able to work effectively in the sector. This will be the benchmark of success in any future plan.

In April, the Government announced an additional £98 million to support talented music, drama and dance pupils. While this is welcome, the bulk of that money will only benefit those who have already been identified as exceptionally gifted. The Government should ensure that funding is available consistently across the whole of the sector so that opportunities are available to all young people no matter where they live, what music they play and what their financial background is. This will lead to a more diverse cohort of creatives being able to enter the talent pipeline.

Provision of music in schools can also be factored into Ofsted inspections with access to creative learning given prominence when awarding a school "outstanding" status.



# MUSIC IN EDUCATION: CASE STUDY

## THE BRIT SCHOOL

Founded in 1991 with funds from the British Music industry, The BRIT School is the leading free Performing Arts and Technology School in the UK. It provides a unique education for over 1,300 pupils aged between 14 and 19 in the fields of music, broadcast media, digital design, community arts, production and performing arts as well as a full academic programme of GCSEs and A Levels. As it is free to attend, the School has a wide demographic of students from all economic and cultural backgrounds.

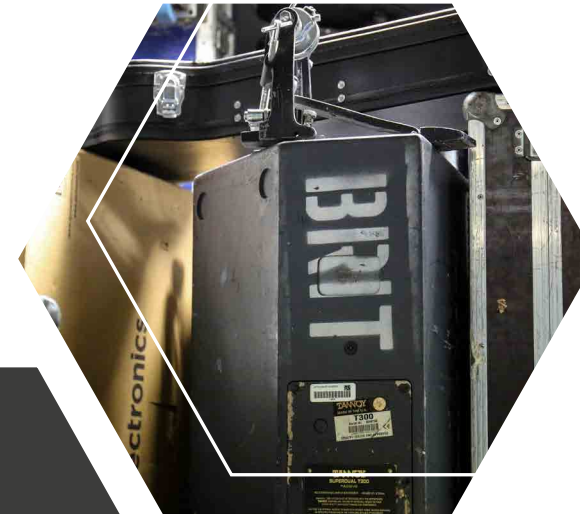
Over the last five years, 99 per cent of students have gone into higher education, training or employment on leaving school and are now working in all facets of the creative industries.

The School is state funded but receives money from The BRIT Awards and The BRIT Trust – from where it gets its name – for much needed resources to fund equipment, stage productions and much more.

The benefits of the School's close relationship with the music industry are tangible. There is direct involvement at

the Awards themselves but also visiting speakers, Governors' relationships, job opportunities, scholarships and relevant work experience are an intrinsic part of the education and made possible due to extensive industry networks. Alumni include Adele, Rex Orange County, Loyle Carner, Ella Eyre, and Dan Gillespie Sells (The Feeling and writer of hit musical, 'Everybody's Talking About Jamie').

With over 7,000 students now having gone through the School, it is proud to have played such a significant part in securing jobs for so many young people in such an important part of the UK economy.



# INFRASTRUCTURE

Facilities, supporting access, and provision for music are critical to developing talent, yet the number of five to ten-year-olds participating in music activities outside of school has fallen from 36.3 per cent in 2012-13 to 34.8 per cent in 2016-17. The number of 11-15-year-olds who have taken part in music activities has fallen from 73.3 per cent in 2012-13 to 60.9 per cent 2017-18.

Venues act as important centres for cultural activity in our towns and communities. Grassroots music venues in particular act as important hubs for local music talent and offer a means by which musicians and performers can cultivate and nurture their creativity.

Supporting grassroots venues is key to maintaining the UK's vibrant and diverse music scene, as well as ensuring we have the talent pipeline to maintain Britain's position as a global force in music.

UK Music has long campaigned on the issues which face music venues across the country, putting strain on thousands and leaving many struggling for survival. It is estimated that 35 per cent of grassroots music venues have closed in the last ten years.

Whilst some solutions have been put in place, such as the recent introduction of the agent of change principle by the UK Government to tackle planning disputes affecting music venues, hikes in business rates and licensing issues still present problems for grassroots music venues.

In addition, these challenges are not unique to venues. Rehearsal spaces, which also provide important access and provision for music talent development are also facing problems.

The funding structure of rehearsal spaces can differ wildly. Many rehearsal spaces exist without access to a core funding stream and rely on ad hoc grants, donations or fundraising activities. Spaces have found that it is often easier to obtain grants for new initiatives yet funding to keep core activities going is always difficult to attract. A lack of a centralised

fund was identified by the spaces in the UK Music Rehearsal Space network as the single biggest barrier to the provision of services.

Recording studios are another vital component to accessing the music eco-system. They demonstrate musical infrastructure that is required to support an artist in developing their raw talent. However, many recording studios are struggling to survive in the current climate. Like many music venues, in recent years they have faced challenges with regard to business rates and planning proposals. For example the rateable value of the world-famous Abbey Road Studios saw a 32 per cent increase in 2017.

It must also be pointed out that some of the challenges in accessing music may be particularly acute in areas of social deprivation.

## THE SOLUTIONS

The Government should bring forward a review into business rates to ensure that recording studios receive a fair revaluation. This would support many SMEs in the music industry to continue to survive.

UK Music recommends that the Government partners with the Music Venue Trust to make an assessment of subsidies available to grassroots music venues, particularly in comparison to other European countries. These are reported to average 42 per cent of operating costs across mainland Europe and are as high as 70 per cent in France.

We also need a review of existing licensing laws. UK Music advocates the further liberalisation of the Licensing Act, building on the achievement of the Live Music Act 2012, as a step to help prevent venue closures.

Following the recent success in getting the 'Agent of Change' principle enshrined in law, it is now essential that all local authorities use this to ensure grassroots music venues are protected when making future planning decisions.

Further investment in the UK Music Rehearsal Space network is needed. This can be achieved via the recently launched Cultural Development Fund. Councillors and youth workers already acknowledge the positive outcomes which arise from these spaces. If these facilities are not available to young people there is a potential loss to creativity. Expansion of UK Music's current scheme would assist with supporting future talent development.



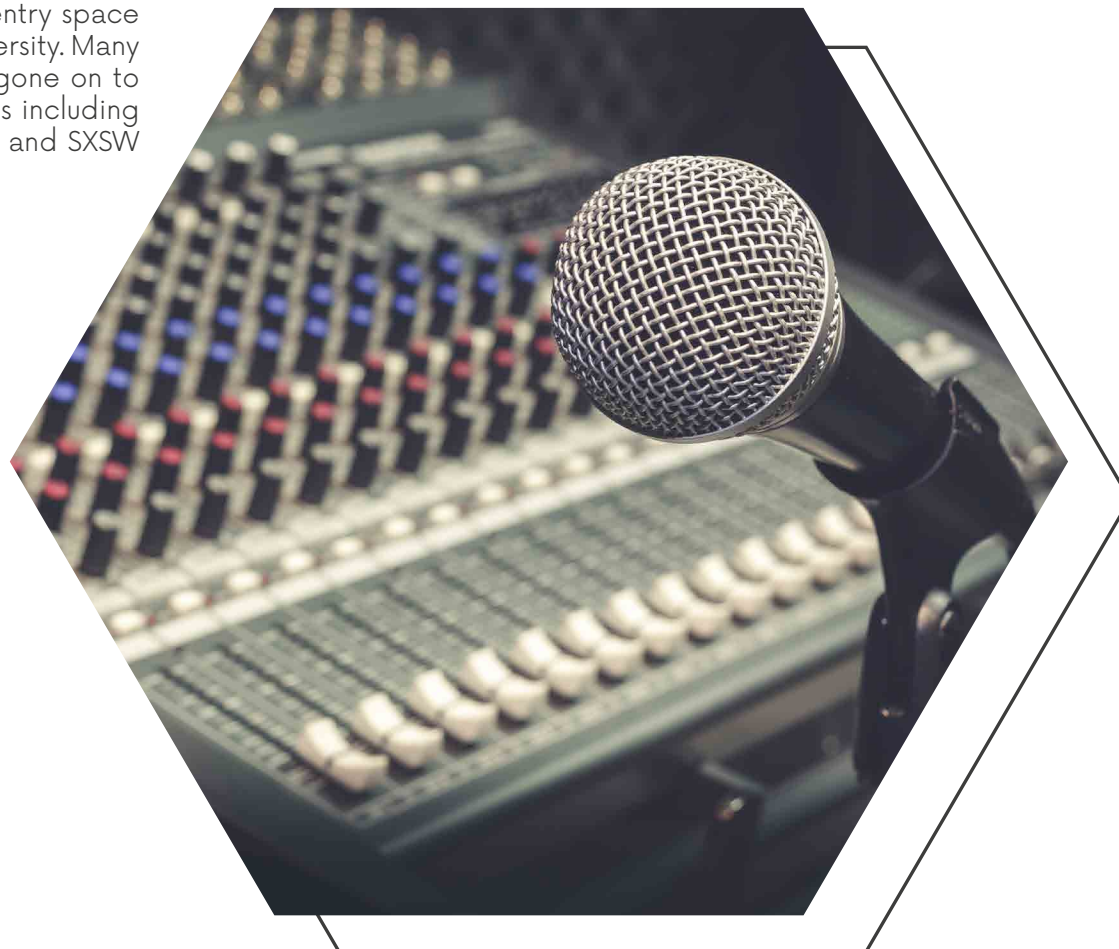


## INFRASTRUCTURE: CASE STUDIES

### UK MUSIC REHEARSAL SPACE NETWORK

UK Music runs a Rehearsal Space network which is firmly embedded in 23 local communities across the country to deliver meaningful projects for young people from poor socio-economic backgrounds, boosting skills and mental health, fostering creativity and driving down crime in local communities.

The spaces offer multiple musical experiences including recording studio facilities. A number of rehearsal space users have gone on to have successful careers within the music industry. Mercury Prize nominated artist Ghostpoet practised in the original Coventry space when studying at the local university. Many other bands and artists have gone on to play major festivals and venues including the Royal Albert Hall, Latitude and SXSW in Austin, Texas.



### THE PUMP

The Pump is a unique charity and a prestigious purpose-built youth facility in an area of severe deprivation, that supports disadvantaged children and young people (up to the age of 25), including those categorised as NEET, i.e. not in education, employment or training; through participatory art, accredited vocational training, volunteering opportunities and work experience, including paid internships. It strives to achieve cultural democracy for young people and address the inequality of opportunity in east Birmingham to support them towards positive outcomes, including employment.

Pump up the Volume is a 30-month project that will engage 600 disadvantaged young people in musical activities to deliver outcomes including improving the music skills and employability of young people. The programme will include workshops to include song writing, performance, vocals, music production, sound engineering, artistic development, the music business, digital media, video production, (social media) marketing and event management. Live music events, including open mic nights and a festival will be opportunities to host guest artists, to showcase the achievements of young

people in East Birmingham and North Solihull (EBNS) and share learning.

This provides young people with a space to express themselves, learn new skills and raise aspirations. The project has the backing of schools in the local area who highlight the impact that this project has on disadvantaged young people. It has given these young people the opportunity to improve their prospects as well as contributing to personal development. It allows young people to overcome barriers such as postcode rivalry and difficulties fitting into mainstream education in an inclusive and engaging way.



## ACCESS TO FINANCE

Financial barriers can act as a significant hurdle for the music talent pipeline with 46 per cent of musicians, composers, songwriters and lyricists needing financial help from family and friends at some point in the development of their professional music career.

The PRS Foundation Momentum Music Fund was set up in 2013 by the PRS Foundation and Arts Council England to address the growing disconnect in the funding of emerging artists. The Fund provides career-boosting grants to pre-commercial, independent artists at a crucial tipping point in their career.

49 per cent of grantees are Black, Asian and Minority Ethnic (BAME). Urban music (Hip Hop, Rap, Grime, R&B and Soul) is the most supported music style. The Fund makes an important contribution to the diversity which exists in the talent pipeline for future signings and commercial deals.

The Fund has also helped overcome socio-economic barriers into the industry with two-thirds of applicants not previously working full-time in the industry and 43 per cent of grantees now working full time. The Fund, which includes partners, PPL and Spotify, has a proven track record in delivering real returns on investment. For every £1 granted by Momentum in its first 2 years, artists have returned £7.46 to the economy. Though the scheme is a success, Arts Council England's withdrawal of funding from Momentum in 2018 is deeply disappointing, particularly when their contribution of £2million across five years generated £13 million of additional investment for emerging talent.

The UK already lags behind other countries globally when it comes to Government-backed initiatives to support talent development. Sweden for example allocated nearly £171.1 million in funding to the arts last year—including at least £6.1 million for music and passed a law in 2009 which stated that *"Culture is to be a dynamic, challenging and independent force based on the freedom of expression. Everyone is to have the opportunity to participate in cultural life. Creativity, diversity and artistic quality*

*are to be integral parts of society's development."*

Meanwhile total government spending on music in Norway has grown in recent years from £91 million to around £109 million.

FACTOR in Canada is a public-private partnership with funds from the Department of Canadian Heritage and Canada's private radio broadcasters, which provided £8.6 million in funding folk, alternative, rock and pop music specifically. In recent years, two of the larger Canadian provinces, Ontario and British Columbia, have also rolled out their own music funds.

The UK Government has recently developed a number of creative sector tax credits to incentivise new productions, however music does not receive equivalent assistance. While the UK's commercial music industry outperforms the rest of the economy, it falls behind when average earnings are taken into account.

According to research carried out by the Office of National Statistics, the average wage in the UK was £27,271 a year. After analysing the earnings of more than 21 million people, it concluded that musicians earned significantly less at £21,410 than many other professions. The same is true for other parts of the music business. The Musicians' Union found that 60 per cent of its members surveyed had worked for free at some point in the last 12 months. It is therefore little surprise that financial barriers remain a significant impediment in the development of talent.

The ability for creators to make ends meet is compounded by YouTube. It is the most popular music service in the world, but due to the shameful rates the Google-owned service pays a track needs to be streamed over 50 million times before artists can earn the average UK wage.

If pursuing a career in music becomes the preserve of those who can rely on the 'Bank of Mum and Dad', when it comes to finding future talent we will be drawing water from an increasingly small well.

## THE SOLUTIONS

The Government does not need to reinvent the wheel here. We already know what works. The Government should partner with the industry in tipping point programmes like PRS Foundation's Momentum Talent Development Fund to incentivise further investment and as a feeder to contribute towards larger export funds already in place.

The Government should also continue to support the Music Export Growth Scheme (MEGS). Managed by the BPI, the scheme is designed to support small-to-medium sized companies by making funding available to build international fanbases and boost music sales. MEGS has now supported over 200 music export projects, achieving an impressive 11 : 1 return on UK government investment across 45 territories.

We are encouraged by initiatives such as Youth Music which recently benefited from £38.6 million Arts Council England funding over the

next four years to offer diverse, creative and inclusive music projects. 76 per cent of Youth Music's investment is allocated to local authority areas that ranked in the 40 per cent most deprived nationally. We advocate that further Arts Council England funding should go to projects such as these.

Artists, musicians, composers and songwriters are taking new and innovative approaches to realising their creativity. The Government should consider the case for extending existing tech R&D fiscal incentives, as well as other measures to incentivise the UK as a destination for music recordings in support of the talent pipeline.

We also need the strongest possible protections for intellectual property and copyright. This includes greater responsibility being placed on online platforms so that creators receive fair financial rewards for their work.





# ACCESS TO FINANCE: CASE STUDY

## PRS FOUNDATION MOMENTUM MUSIC FUND

The PRS Foundation Momentum Music Fund offers grants of £5k-£15k for UK artists and bands to break through to the next level of their careers. Eligible activities for funding include recording, touring and marketing.

Since 2013, over 270 artists and bands have been supported by the fund. Artists that have succeeded through Momentum include Years & Years, Bugzy Malone, Ghostpoet, Public Service Broadcasting, Kate Tempest and Anna Calvi. It has resulted in the creation of over 160 albums, 180 UK tours and 1,000 live dates.

The following is taken from "Five Years of the Momentum Music Fund", an evaluation undertaken by Tom Fleming Creative Consultancy:-

*"Many artists are struggling: to get the next album together, to find the time to write when they need to tour to earn, or to promote their work to achieve anything like the recorded income needed to survive, let alone thrive. This is particularly but not exclusively so for independent artists (by choice or who are seeking a deal with a label). It is also particularly so for artists from more deprived backgrounds or for genres and scenes for which the 'ecosystem' – inclusive of managers and promoters*

*– is less developed. Momentum has played a vital role in supporting artists to get to the next level – whether this be through reducing the financial burden of making new work, touring or marketing. It has also helped to boost confidence – validating artists and giving them the energy to continue when they might in other circumstances walk away."*

For further information and to apply please visit <https://prsfoundation.com/funding-support/funding-music-creators/next-steps/momentum-music-fund/>

Previous recipients of Momentum include Jaykae, Bugzy Malone and Little Simz [pictured L-R].





## CONCLUSION

The common theme throughout this report is opportunity. The music industry has always thrived on opportunities, yet so-called “lucky breaks” do not happen by accident. They are the result of years of hard work, underpinned by having an education system that supports music and creativity, as well as ensuring that we have the right infrastructure in place and targeted funding and investment.

Cuts to music in state schools, venue closures and opportunities to pursue a career in music being limited to those who have access to the ‘Bank of Mum and Dad’ are putting our talent pipeline and the future success of our industry at risk. And the country will be all the poorer because of it, both culturally and economically.

All is not lost however.

This report has also highlighted a number of encouraging initiatives, such as the UK Music Rehearsal Spaces network and PRS Foundation Momentum Music Fund, which present positive opportunities for fixing problems in music’s talent pipeline.

The solutions set out in this report need to be enacted to increase the reach and impact of the encouraging initiatives that do exist, as well as plugging identified gaps. Industry clearly has a major role and is willing to play its part. But government

and policy-makers have a role to play here too. They provide a framework and environment which sets the conditions for opportunities to be realised. That is why it is imperative that they work with industry to overcome these problems and maximise opportunities for the future. If we do so, there is no reason why British music shouldn’t go from strength to strength.



## KEY INFORMATION

This report, produced in September 2018, brings together a number of sources of information and data. More details are available via the following links:

UK Music Measuring Music 2017  
<https://www.ukmusic.org/research/measuring-music-2017/>

Pollstar 2017 Top 100 Worldwide Tours  
[https://www.pollstar.com/Chart/2018/01/2017YearEndTop100WorldwideTours\\_621.pdf](https://www.pollstar.com/Chart/2018/01/2017YearEndTop100WorldwideTours_621.pdf)

UK Music – Response to House of Commons DCMS Select Committee inquiry into the Social Impact of Participation in Culture and Sport  
[https://www.ukmusic.org/assets/general/UKMusic\\_DCMS\\_SelectCommittee\\_Culture\\_Sport.pdf](https://www.ukmusic.org/assets/general/UKMusic_DCMS_SelectCommittee_Culture_Sport.pdf)

UK Music – Response to Government consultation on industrial strategy  
[https://www.ukmusic.org/assets/general/newUKMusic\\_IndustrialStrategy\\_2017\\_FINAL.pdf](https://www.ukmusic.org/assets/general/newUKMusic_IndustrialStrategy_2017_FINAL.pdf)

### Music in Education

The impact of instrumental music learning on attainment at age 16: a pilot study by Susan Hallam and Kevin Rogers  
<https://www.cambridge.org/core/journals/british-journal-of-music-education/article/impact-of-instrumental-music-learning-on-attainment-at-age-16-a-pilot-study/F439F0A77A79858988B66C172FF5CC72/core-reader>

University of Sussex report into the EBacc  
<http://www.sussex.ac.uk/education/newsandevents/news?id=39525>

Research Brief: Extra Curricular Inequality by the Sutton Trust  
<http://www.suttontrust.com/wp-content/uploads/2014/09/Extracurricular-inequality.pdf>

UK Music – Response to 2018 GCSE results  
<https://www.ukmusic.org/news/uk-music-chief-warns-alarm-bells-should-be-ringing-following-another-drop-i>

A JAMES Creative and Educational Proposal  
[http://www.jamesonline.org.uk/resources/edu\\_proposal/](http://www.jamesonline.org.uk/resources/edu_proposal/)

### Infrastructure

A Narrative-Based Evaluation of “Changing Tunes” Music-based Prisoner Reintegration Interventions by Jo Cursley, Ph.D and Shadd Maruna, Ph.D  
<https://static1.squarespace.com/static/57d94a1d5016e175c356668f/t/595b728fb3db2b30634d08ae/1499165332938/A+Narrative+Based+Evaluation+Cursley+and+Maruna.pdf>

UK Music – Response to House of Commons DCMS Select Committee inquiry into live music  
[https://www.ukmusic.org/assets/general/UK\\_Music\\_-\\_DCMS\\_Live\\_Music\\_Inquiry.pdf](https://www.ukmusic.org/assets/general/UK_Music_-_DCMS_Live_Music_Inquiry.pdf)

UK Music – Call for Business Rates Review  
<https://www.ukmusic.org/news/uk-music-calls-on-chancellor-for-budget-review-of-business-rates>

DCMS Taking Part 2012/13 Child Report  
[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/231004/Taking\\_Part\\_Year\\_8\\_2012\\_13\\_Child\\_Report.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/231004/Taking_Part_Year_8_2012_13_Child_Report.pdf)

DCMS Taking Part 2016/17 Child Report  
[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/648073/Taking\\_Part\\_child\\_statistical\\_release.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/648073/Taking_Part_child_statistical_release.pdf)

### Access to Finance

Five Years of the Momentum Music Fund, an evaluation undertaken by Tom Fleming Creative Consultancy.  
<http://prsfoundation.com/wp-content/uploads/2018/05/Momentum-Report-2018-web-version.pdf>

How countries around the world fund music and why it matters  
<https://pitchfork.com/features/article/how-countries-around-the-world-fund-musicand-why-it-matters/>

Time for tech giants and Government to give musicians a fair deal by Michael Dugher (CEO, UK Music)  
[https://www.huffingtonpost.co.uk/michael-dugher/uk-music-industry\\_b\\_18335808.html?guccounter=1](https://www.huffingtonpost.co.uk/michael-dugher/uk-music-industry_b_18335808.html?guccounter=1)



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