

SOUNDING OUT THE FUTURE:

Key skills, Training, and Education in the Music Industry

Research Exercise by
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Commissioned by The National Music Council



Sounding out the Future

This research is the first report to be commissioned by the National Music Council (NMC) that maps current and planned training provision by music industry employers and other representative bodies. It also estimates the level of investment in human and financial terms being made in training, existing and planned, as well as summarising perceptions of the type and shape of Sector Skills Council (SSC) that will best suit the music industry's collective and individual, sub-sectoral needs.

The background to this research is a music industry which, according to the NMC's own report on the value of the music industry to the UK economy generated a total value added in excess of 3.6 billion in 2000 (*Counting the Notes*, National Music Council 2002). It is an industry in which many workers are self-employed, so it is difficult to pinpoint an accurate figure for employment in the business. However *Counting the Notes* gives an estimate of circa 125,000 full time equivalent employees working across all the sub-sectors of the music industry.

The National Music Council is extremely grateful to the University of Paisley researchers, Allan Dumbreck, Kwela Hermanns and Kate McBain, for producing such a thoroughly analysed and in-depth report, which will help to inform the music industry's future thinking and that of the organisation that the music industry chooses to support in a bid for SSC status. The NMC is also very appreciative of Metier's funding for this research. Metier's funding for this research made possible as a result of support from the European Social Fund, EQUAL and the Department for Education and Skills.

Thanks are also due to all those who took part in the research exercise – trade associations, unions, employers, employees and self-employed individuals. The report would not have reached publication without the hard work and dedication to the cause of the initial steering group, in particular, Doug D'Arcy (AIM), Jane Fear (Metier – observer status), Peter Filleul (Association of Professional Recording Services), Jenny Goodwin (Music Publishers Association), Chris Green (British Academy of Composers and Songwriters), Remi Harris (AIM), Fiona Penny (National Music Council), Bob Wearn (Musicians' Union), Stuart Worthington (Music Managers Forum), and Andrew Yeates (British Phonographic Industry).

Robin Osterley
Chairman, National Music Council

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Foreword

1. Object and scope of research

On 31st March 2002 the system of National Training Organisations (NTOs) which had liaised between the educational and training interests of various employment sectors and the DCMS / DfES ceased to exist. It was replaced by the Sector Skills Council network (SSCs) whose role is intended to be broader and more involved than that of their predecessors.

Although the Department for Culture, Media and Sport (DCMS) indicates on its website that its intention is “that all of its sectors are covered by Sector Skills Councils”, as yet there is no SSC which represents the UK Music Industry.

In order to assess the possibilities and options for an SSC to represent the Music Industries this research was commissioned by the National Music Council (NMC) on behalf of all the UK music industry trade organisations. The objectives were threefold :-

- A. to identify current and future key skills and training needs in the music industry
- B. to map existing and planned training provision by the music industry including estimating investment, and
- C. to investigate the potential nature of the music industry's interface with a new SSC.

The research was conducted by interviewing 55 music industry professionals who were contacted from an initial list of 70 names provided by the NMC (37 represented trade organisations and 18 were employed by companies).

This research brief ties in with a number of questions asked by the DfES of any sector considering representation or inclusion in a new SSC. The scope of the research also reflects the DfES' qualifying comment that “although SSCs will be led by employers, every SSC is expected to include other relevant organisations, such as trade associations, professional bodies and trade unions.”

2. Background : Research in context of Government policies and SSCs

The music industry occupies a particular, if not unique, position within the realm of creative industries and within the Government's defined target areas for current and future industries represented by Sector Skills Councils (SSCs). In relation to Government guidelines the music industry should clearly be represented within SSC landscapes.

It could be argued that the current Government has done more to recognise and support the UK music industries than any previously elected. The DCMS has created the Music Industry Forum (MIF) and a Creative Industries Higher Education Forum in order (partially at least) to consult both industry and education on skills development. Its website indicates with reference to education and skills that its intention is to “develop a shared vision of the issues impacting on the creative industries..”, “to address the opportunities for education and industry in the international arena” and “to work with employers and universities to ensure that students have the knowledge and skills necessary to progress quickly from university to employment”.

Bridging the gap : Music industry employment and SSC remit.

The music industry's frequent calls in this research exercise for a new representative body for education and training and for greater cross sub-sector understanding and communication are consistent with DfES' SSC remit that "their enhanced funding and status means they will be expected to play a bigger role with employers in the sector".¹ and "they will be expected to work throughout the UK".²

The over-riding message from the Government is one of greater expectations for SSCs than for their NTO predecessors. Goals for the SSCs include "to reduce skills gaps and shortages"; "to increase opportunities to boost the skills and productivity of everyone in the sector" as well as "to improve productivity, business and public service performance"; and "to improve supply including apprenticeships, higher education and national occupational standards."³

The overall significant rise in the expectations which the DfES has of SSCs over NTOs was reflected by the majority of those surveyed. A need for SSC 'accountability' is one of the priorities that has also emerged.

The 7 sub-sectors within the music industry sector:⁴

Sub-sector A:	Composition of Musical Works & Music Publishing
Sub-sector B:	Production, Retail & Distribution of Musical Instruments / Audio Equipment
Sub-sector C:	Promotion, Management & Agency Related Activities
Sub-sector D:	Live Performance
Sub-sector E:	Recording
Sub-sector F:	Retail & Distribution of Recordings
Sub-sector G:	Education & Training (including recruitment)

When reading this report the term "sector" should be understood to mean the entire music industry (comprising the seven Sub-sectors) whereas "Sub-sector" is an individual area within the music industry (eg : Sub-sector D - Live performance)

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¹ SSDA (2002), "In-fluence", Skills For Business

² www.ssda.org.uk

³ www.ssda.org.uk

⁴ This taxonomy of sub-sectors was kindly supplied by the client, The National Music Council

The Trade Organisations, Companies and Individuals who contributed to this research :-
ABRSM Publishing Ltd, British Academy of Composers and Songwriters, British Music Rights,
Fairwood Music, MCPS-PRS Alliance, Music Publishers Association (MPA), Oxford University
Press (OUP), PRS Foundation, Warner-Chappell Music Ltd, Music Industries Association (MIA),
Agents Association, British Arts Festivals Association (BAFA), British and International Federation
of Festivals, Concert Promoters Association (CPA), First Column, International Artist Managers'
Association (IAMA), Music Managers Forum (MMF), Association of British Orchestras (ABO),
Incorporated Society of Musicians (ISM), Jazz Services, Making Music, Musicians' Union (MU),
PLASA, AIM, Association of Professional Recording Services (APRS), British Phonographic
Industry (BPI), International Association of Music Librarians (UK) (IAML UK), Music Producers
Guild (Freelance professionals), Phonographic Performance Ltd (PPL), Sony UK, Sound to Picture,
Universal, British Association of Record Dealers (BARD), Barclay Executive, Career Moves, CM
(formerly Community Music), Federation of British Conservatoires (FBC), Federation of Music
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It should be noted in each summary / QA that when an individual or organisation is named the views expressed are their own personal perspectives and not necessarily that of the Sub-sector.

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EXECUTIVE SUMMARY

A. Key issues / findings

- A conservative estimate of £5M*pa is currently spent by the music industry on education and training.
- The industry may be willing to increase this spending (capability unknown).
- The industry is willing to support a new SSC (resources, advice, collaboration).
- There is an identified need for an SSC to represent the music industry (specifically to address professionalisation of education & training).
- The industry is willing to work with HE / FE / training.
- Diverse skills needs have been identified with soft skills high on agenda.
- The industry requests more cross sub-sector collaboration / dialogue

** It should be noted that £ 1/2 of this is invested by METIER and therefore NOT generated within the industry.*

B. Key requests for SSC activity

A future SSC should :-

- be industry led and consult music industry on an ongoing basis.
- facilitate communication with and between industry, government and education.
- be accountable to industry.
- oversee the categorisation and linking / rationalisation of education & training activity conducted by the industry to synchronise efforts and avoid duplication.
- encourage initiatives which are cross sub-sector or cross industry / education or both.
- be involved in CPD and encouragement of existing workforce to re-skill / re-educate (notably in soft skills).

C. Key skills across entire sector

Overall, the most important key skills identified (unprompted), listed in order of importance are:

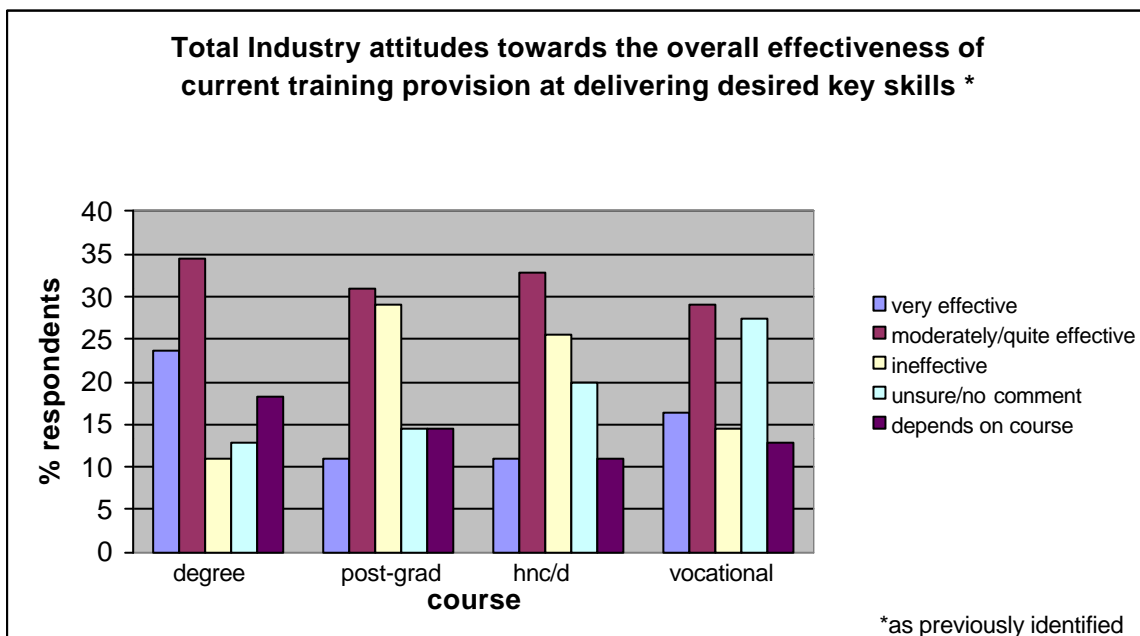
1. **Communication skills** (including client / staff relations, diplomacy, groups, interpersonal and presentation skills, and public speaking)
2. **Finance** (including budgeting, freelance, taxation / accounting, and charity)
3. **Administration / Organisation** (including time management and fundraising)
4. **Technical skills & knowledge**
5. **Flexibility** (including multi-functionality and diversification)
6. **Management**
7. **Business skills & awareness**
8. **Industry & sector knowledge**
9. **Marketing**
10. **Performance**
11. **Creativity**
12. **Dedication / Motivation / Drive / Ambition / Commitment**
13. **IT** (including Internet)
14. **Leadership** (including creative direction, encouragement, and crowd control)
15. **Legal skills & knowledge**

Soft skills / hard skills

One of the most consistent messages arising from this survey in relation to key skills at various career stages is the increasing importance of so-called 'soft skills' (communication skills, flexibility, etc). While hard skills (IT, finance, technology, etc) are deemed crucial for entry into the industry (or a given sub-sector or professional career path), the sector is almost entirely agreed that enhanced soft skills are the main driving force behind career progression and moving between sub-sectors.

D. Industry attitude towards existing education and training

The attitude of the music industry towards existing education and training programmes is predominantly supportive. Many requests for an evaluative mapping exercise and further information indicate an industry trying to develop an understanding of the existing and possible future value of training and education.



E. Existing industry investment in training and education

The music industry's total estimated financial, time and human resource investment in training and education based on information obtained in this research survey is just below £5 million. This estimate figure does not include *all* planned training provision that may already be in progress or at trial stage, while it also excludes any investment which may be in existence but for which information or figures were not forthcoming from various sources. One can therefore safely assume that the actual figure of music industry investment in education and training is significantly higher than £5 million. It should be noted that the training and education investment made by the music industry trade organisations in terms of time, effort and finance is substantial and contributes significantly to this total.

It should also be noted that public funding, most notably for and within sub-sector G here surveyed (The Education and Training Sector) has been included in this estimate figure, and that sub-sector G indeed contributes the highest overall share within this figure (48%). It is

followed by sub-sector A with 26%, E with 11%, D with 8%, and C with 7%. (See appendix 6)

Types of investment

In terms of different types of investment in education and training in the music industry, the following figures emerge from this research exercise.

The estimated total financial investment is led, again, by sub-sector G with 58%, followed by sub-sector A with 20%, D with 5%. E with 11% and C with 6%.

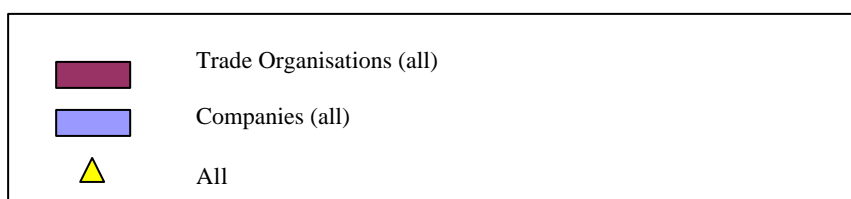
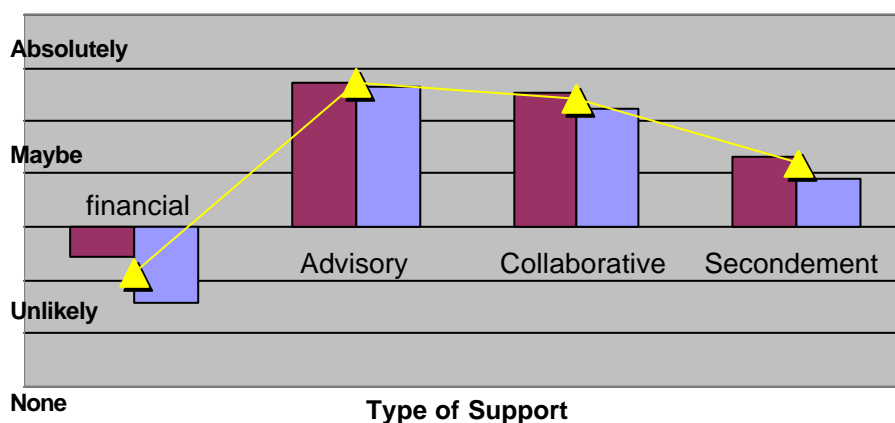
The total time, administrative, and human resources investment in training and education, on the other hand, is estimated to be led by sub-sector A with 35%, followed by sub-sector G with 32%, D with 12%. E with 11% and C with 10%.

From undertaking this present mapping exercise and in compiling the ensuing data, the following becomes clear: The various sub-sectors are engaged in a whole range of different activities defined as 'education and training', which may need to be further categorised or put into a workable and transferable taxonomy.

F. A new SSC : projected support from the music industry

Although the industry's approach to contributing financially to a new SSC must be described as 'unwilling', there is great willingness to contribute in advisory and collaborative capacities. The secondment of (human) resources to any future SSC and its potential activities is 'probable' across the industry.

Intimated degree of Industry Support for Future SSC Initiatives



SUB-SECTOR A

Composition of musical works & music publishing

(Comprising music publishing companies, publishers and songwriters representative organisations and publishing royalty collection societies)

SUMMARY & QUALITATIVE ANALYSIS

Top five (unprompted) skills for sub-sector A :

1. Across sector / industry knowledge
2. Basic legal knowledge
3. Musicology / musical literacy
4. Business skills and awareness
5. Creativity

Recommendations for a new SSC (Sub-sector A) :

- **Professionalise education and training in the music industry by :**
 - Identifying specific training needs and key skills through communication with sub-sectors,
 - Obtaining an *evaluative* overview of existing formal *and* informal musical training and education activity across the UK through surveys,
 - Engaging arts organisations and gaining their support,
 - Generating dialogue for training and education, and avoiding duplication of efforts and establishing partnerships (education and industry bodies)
 - Address the importance of transferable skills
- **Consolidate fragmented music industry and its various industry organisations approach to education into a one-voice body which concentrates on:**
 - Creating a realistic picture of the industry's needs & lobbying government
 - Harmonising recruitment mechanisms across the industry
 - Addressing over-subscription and lack of job opportunities
 - Providing career advice for entry level and long term industry professionals including setting up a helpdesk (grants, funding, legal issues)
- **Be industry-led and provide freelance opportunities and encourage independent business and companies**

SUMMARY & ANALYSIS SUB-SECTOR A

Composition of musical works & music publishing

1. Skills and Training

Key messages:

- Most important key skills are knowledge of copyright, legal & musical skills, personal interaction, IT and general business awareness
- Musical skills are more important in this sub-sector than elsewhere
- Overall importance of soft skills
- Both hard & soft skills crucial for career progression, with soft skills regarded as crucial for moving between sub-sectors
- Major challenges & opportunities reside in the area of new technology
- Key future opportunities in cross-creative industries & transferable skills
- Strongly perceived differences between the classical and "rock & pop" arenas, which impact on training and recruitment
- Main barriers to recruitment are over-subscription, lack of resources, low salaries, lack of professional standards and lack of relevant training & sub-sector specific knowledge
- Degree courses are generally viewed favourably, including music specific qualifications

Key skills current & future

The unprompted key skills named overall in this sub-sector fell into the following categories. One was knowledge of the music industry and general business awareness / acumen, including promotional skills, accounts handling, commissioning, contracts and copyright awareness. Another was the area of new media, from computer and data processing skills to software packages. Thirdly, musical skills were mentioned repeatedly, and these included song-writing and lyrical skills as well as associated freelance skills, and a general understanding and knowledge of music. Finally, editorial skills were of high importance, - *and this is a notable difference with many other sub-sectors surveyed in this research exercise*. Soft skills were overall rated high across all interviewees.

A quantitative analysis of unprompted key skills in this sub-sector shows that general industry and sub-sector specific knowledge scored the highest, followed by basic legal skills, musicology and business skills and awareness. Creativity, interpersonal and communication skills also made the Top 10 of unprompted key skills in this sub-sector, as did editorial skills and finance. IT scored just outside of this, ranked at 11

Communication and interpersonal skills rated slightly lower than they did across the entire research exercise where these key skills received the highest rating, however, key skills ratings in Sub-sector A are not inconsistent with the overall research exercise outcome. Perceived future skills in relation to current challenges and opportunities were mainly listed as strategic thinking, knowledge and skills in new media, and editing and book production [see appendices 1.4 & 2.4]

Key challenges, problems & opportunities

The main area reported as presenting problems and challenges - but also distinct opportunities - was "new technologies". Various issues surrounding the Internet, licensing, copyright and contracts negotiations were explicitly mentioned, or referred to, by all interviewees in this sub-sector. Although the majority viewed these as problematic and threatening, the potential impacts of new technologies on the music industry were also deemed to be affording new opportunities for exploitation and revenues in music. In this context, the issue of investment was discussed by Sub-sector A interviewees. In order to embrace those features of new technology that may in future enhance the business of music, it was pointed out that the industry needed to show more willingness to support creative approaches. This also tied in with criticisms made in this sub-sector of a general shift from creativity and originality in the industry towards increasing emphasis on packaging and formulae. These types of observations were also described as "structural problems" within the music industry.

Interviewees also spoke of the "fragmentation" of the industry and "lack of cross-fertilisation", or across-industry knowledge. Within the areas of training & education, and recruitment, they underlined their concern for a lack of professional standards across the industry. Other related problems were listed as lack of resources, low turnover of human resources, declining markets, and a lack of specialist skills (especially in the area of editorial and print production).

Over-subscription and over-saturation were a common refrain among interviewees in this sub-sector. In conjunction with this, many interviewees also mentioned low salaries, or lack thereof, and the geo-centric clustering of work opportunities in and around London.

Perceptions of existing training & education

Perceptions of degree courses, postgraduate qualifications, and HND / HNC and vocational courses varied at times in this sub-sector; however, an overall picture does emerge. Generally, degree courses were looked upon most favourably, with postgraduate courses a close second, and HND / HNC and vocational courses rated to be of quite low importance or efficacy.

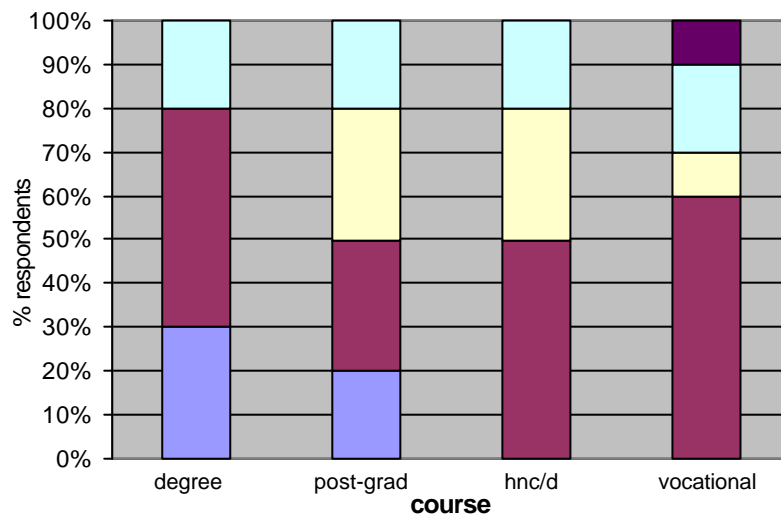
In Sub-sector A, 30% of interviewees deemed degree courses very effective and 50% moderately or quite effective. 20% of interviewees rated postgraduate qualifications to be very effective and 30% moderately / quite effective.

HND / HNC courses scored just behind the above, attracting no very effective votes, but 50% of moderately / quite effective votes. Vocational courses scored a 60% rating of moderately / quite effective.

It appears that for this sub-sector, the value of degree courses overall resides in their image - or the academic reputation they carry -, rather than specific course contents. For the classical / musicology sub-sector, music degrees have been, and continue to be, of traditional importance. However, these qualifications suffered from a lack of vocational orientation in terms of business studies. A similar criticism was also levelled against qualifications in other areas of this sub-sector, with more than one voice calling for degree courses to have a more vocational approach and nature.

However, HE qualifications did fare significantly better in ratings by this sub-sector than HND / HNC or vocational courses. Degree courses received a quite effective rating, followed by postgraduate degrees in between quite effective and ineffective. The remaining vocational courses received an overall lower rating.

SsA –Attitude towards the Efficacy of Current Training Provision at Delivering Key Skills



KEY ■ Depends on Course ■ Unsure/No Comment ■ Ineffective
 ■ Very Effective ■ Moderately/Quite Effective

2. Interface with a new SSC

Key Messages:

There is an overall strong contingent support for a new SSC & high degree of willingness to contribute, however this the new SSC needs to:

- Identify key training needs in specific sub-sectors & survey existing provision across the UK
- Widen the geographical remit of training & extend training initiatives and opportunities to the subsidised sub-sector
- Form partnerships with education and integrate training needs into existing provision
- Address over-subscription and facilitate training despite lack of job opportunities
- Facilitate cross-industry understanding of training needs & encourage closer industry co-operation to avoid duplication of educational efforts
- Facilitate a consolidation of fragmented industry organisations into a one-voice body & lobby to government
- Encourage independent businesses and companies
- A new SSC should lobby government & be industry led

The new SSC might also consider:

- Providing a "help desk" for funding, grants & legal issues
- Providing freelance work opportunities, courses on soft skills and business planning and licensing & pyramid style CPD models

Level of support and contributions to a new SSC

Sub-sector A can be summarised and described as showing a high potential level of support for a new SSC. Most interviewees had clear ideas and suggestions on how a new SSC might act on behalf of the music industry's interests, with only the occasional voice unsure as to how such a new interface between industry and SSC might work. Not unlike other sub-sectors surveyed in this research exercise, any degree of willingness to support a new SSC, or contribute to it, was dependent on financial and human resource availability as well as a new SSC's image. Sub-sector A, like other sub-sectors, emphasised the need for any new SSC to be industry led, with industry involvement at the planning stage, and the avoidance of agendas "being driven" by the SSC.

For this sub-sector, one of the most important issues was that a new SSC must clearly understand the difference between general or "common" skills, and sub-sector specific

skills, in order to address skills shortages and other problems related to education and training.

Sub-sector A showed itself most likely to contribute to a new SSC in an advisory capacity - this type of contribution received a unanimous "yes". Human resource secondment and collaboration were described as between "yes" and "likely", while financial contributions were marginally more questionable, but overall "likely".

SsA – level of Interest in future SSC support

Type of Support	Yes	Probably	Maybe	Unlikely	No	NC*
Financial	10%		30%	10%	10%	40%
Advisory	90%					10%
Collaborative	80%	10%				10%
Resource secondment	40%	10%	20%	10%		20%

*NC - No comment

Statements & issues :

On Training and Education

- "Perceived gulf between the funding system and the industry"
- "Postgraduate qualifications are not key, but they give another string to the bow"
- "Formal sub-sector courses need a more vocational approach ..."

On the Industry

- "A fragmented industry ... lacking cross-fertilisation ..."
- "The Internet can provide opportunities which could open all kinds of possibilities ..."
- "People specialise quite early on in their career ... and end up staying "
- "Big scale salaries are more limited within the arts than the commercial sub-sector, mainly due to the relatively small size of companies within it"

On a new SSC

- "Common sense ... a good ear ... and empathy..."
- "Identify needs and share resources as appropriate ..."
- "A good level of support for a new SSC..."

SUB-SECTOR B

Production, retail & distribution of musical instruments / audio equipment

(Comprising the musical instrument manufacturers trade organisation)

SUMMARY & QUALITATIVE ANALYSIS

Top five (unprompted) skills for sub-sector B :

1. IT
2. Communication skills
3. Finance
4. Foreign Languages
5. Across sector / industry knowledge

Recommendations for a new SSC (Sub-sector B):

- **Standardise education & training in the music industry including national standards.**
- **Undertake mapping exercises to identify key skills in the sub-sector.**
- **Enable sub-sector to address delivery of key skills training opportunities.**
- **Address the lack of specific educational initiatives and targeted, sub-sector specific training in this sub-sector.**
- **Ensure continual dialogue within sub-sectors rather than focussing on research.**

SUMMARY & ANALYSIS SUB-SECTOR B

Production, retail & distribution of musical instruments / audio equipment

1. Skills and Training

Key messages:

- Most important key skills reside in the areas of Communication skills, IT, across industry / sector knowledge & finance
- Degrees are seen as highly effective, HNC/HND courses receive a high rating
- Unrealistic job expectations, low salaries & both image and reality of sub-sector specific jobs are main challenges and barriers to recruitment
- High level of support for / contributions to a new SSC - if standardisation of training & education, dialogue across sub-sectors, and key skills are addressed
- Basic skills named as crucial, including numeracy
- General skills are key for entry level, soft skills for career progression & moving between sub-sectors

Key skills current & future

Altogether, ten unprompted key skills were listed: Communication, finance (including budgeting, freelance, taxation / accounting and charity related activities), foreign languages, industry and sub-sector specific knowledge, information handling and data processing, and IT (both general and advanced). Basic skills were also listed (literacy and numeracy).

Three of these unprompted key skills were consistent with the Top 10 Key Skills table for the entire research exercise across all sub-sectors. These are communication, finance, and industry knowledge. Notable differences included the high ranking of IT and numeracy / literacy, which were less high for the overall table of key skills.

Prompted skills were not dissimilar with the addition only of attitude and general business skills (managerial, negotiating and teamworking) [see appendices 1.5 & 2.5]

*It should, however, be noted that **only one person** (from an industry organisation rather than a company) was interviewed in this sub-sector.*

Key challenges, problems & opportunities

The main problem expressed by the interviewee was the perceived lack of specific training opportunities for this sub-sector. The sub-sector's image was considered a barrier to recruitment, as too many prospective employees had unrealistic job expectations and low

salaries acted as a disincentive. Many entered the sub-sector, not as a career choice, but as a stepping stone towards other opportunities, often as hopeful musicians. Anti-social working hours was listed as another problem.

Opportunities included the consolidation and / or collaboration of the various parts within the sub-sector to create improved communication and critical mass.

Additional Information

It should be noted that these difficulties are compounded by this sub-Sector having a “two-tier” system of operation with several large chains being professional, modern and people focused alongside the independent stores which make up the vast majority of the sub-Sector but are perhaps less developed. In addition no “umbrella” body for skills and training exists to represent the entire Music Industry, leading to poor communication and synergy. (source – Paul McManus MIA)

Perception of existing training & education

Degree courses, HND / HNC and vocational courses were all viewed favourably and effective, although uncertainty was expressed in relation to vocational courses. One of the main problems with regards to training and education needs was the current lack of specific training opportunities tailored to this particular sub-sector.

SsB –Attitude towards the Efficacy of Current Training Provision at Delivering Key Skills*

Degree	Very effective
Post – grad	Unsure / No comment
HNC / D	Very effective
Vocational	Unsure / No comment

* Bar chart inappropriate as information was drawn from a single source

2. Interface with a new SSC

Key messages:

- Strong level of support for a future SSC
- High level of willingness to make various contributions to a new SSC
- Continual dialogue within sub-sectors should replace the need for ongoing research

Level of support and contributions towards a new SSC

The sub-sector expressed a high level of potential support for a new SSC. It signalled willingness to contribute financially to future SSC activities, as well as in collaboration, advisory capacity, and through time and human resource secondment.

SsB – level of Interest in future SSC support

<u>Type of Support</u>	Yes	Probably	Maybe	Unlikely	No	NC
Financial	100%					
Advisory	100%					
Collaborative	100%					
Resource secondment		100%				

Statements & issues :

On Training and Education

- "A basic overall (educative) plan (is needed)... that will become a nation-wide standard."

On the Industry

- "High turnover of staff, because there is no obvious path to climb".
- People needed to have "more realistic expectations of their career paths."
- "Large number of people ... who enter as musicians and see jobs in this sub-sector as a stepping stone to being a star"

On a new SSC

- "It would be of great benefit to converge with other similar sub-sectors and organisations, and the SSC would be a great starting point"
- "Get a Steering Group together..., with council and sub-sector meetings and annual general meetings"

SUB-SECTOR C

Promotion, Management & Agency related activities

(Comprising the artist management trade organisation, live events trade organisations, the booking agents trade organisation and the performing artists rights association)

SUMMARY & QUALITATIVE ANALYSIS

Top five (unprompted) skills for sub-sector C :

1. Communication skills
2. Finance
3. Management & team skills
4. Marketing
5. Across industry / cross sector knowledge

Sub-sector C: Recommendations to a new SSC

- **A new SSC needs to be industry led.**
- **A new SSC should undertake information gathering including -**
 - research into industry models, which may be ineffective, or are not highly effective.
 - Undertake a mapping exercise of existing and available training & education.
- **A new SSC should address the accreditation and standardisation of education & training in the music industry generally, and Sub-sector specific, possibly through implementing "one-stop shop" mechanisms towards improving and defining progression routes.**
- **Provide more flexible access to learning, especially non-full time courses or short intensive courses.**
- **Introduce / establish formal standards with regards to qualifications, whilst encouraging the industry to contribute to training.**
- **A new SSC should**
 - help with the promotion of Sub-sector organisations and its members activities through networking
 - bring media and funding sources into contact
 - ensure that funding is made available to Sub-sectors.
 - facilitate cross Sub-sector communication, understanding, and learning
 - work closely with the industry and TAs to develop support programmes for international trade projects and help them develop management skills

SUMMARY & ANALYSIS SUB-SECTOR C

Promotion, Management & Agency related activities

1. Skills and Training

Key messages:

- Most important (unprompted) key skills are communication skills, finance, management & marketing
- Formal education overall is seen as having potential in addressing main problems & challenges in training & education
- Vocational courses are seen as "very effective"
- Main challenges include corporate take-overs, mergers & acquisitions, new technologies, government regulations piracy & (new) revenue streams
- Industry needs to invest in artists and cross-pollinate training & education
- Main barriers to recruitment are over-subscription, lack of specific & relevant training, lack of progression routes, low salaries, and lack of awareness of funding sources
- Voluntary work has specific needs, particularly in the area of funding
- Future skills are creativity, lateral thinking, media skills, improved awareness of funding opportunities & improved time management

Key skills current & future

The most important unprompted key skills for this Sub-sector were communication skills, including client and staff relationships, diplomacy, groups, interpersonal skills, presentation, and public speaking. This was followed by finance (including budgeting, freelance, taxation and accounting, and charity related needs) and management skills. Other unprompted key skills were general marketing, administration and organisation (including management and fundraising), flexibility (including multi-functionality and diversification), industry and sub-sector-specific knowledge, and legal (including rights, copyright, and data protection)

In comparison with the most important unprompted key skills across the entire research exercise, the two most highly rated key skills in Sub-sector C tallied entirely: Communication and finance.

In terms of prompted hard and soft skills, Sub-sector C privileged managerial skills, strategic planning, time management, IT literacy, contracts and across industry / Sub-sector specific knowledge, accountancy & finance, secretarial & admin, and Web & new media skills. Copyright awareness was also important.

The most important soft skills - rated "extremely important" without exception - were communication, negotiation & networking skills and attitude; followed by lateral thinking including problem solving, team-working skills, and leadership and leadability.

Most future skills resided in these areas, too, with some notable exceptions which arose from specific contexts and organisations interviewed, notably, the voluntary context, exploiting opportunities for funding, or negotiating government intervention [see appendices 1.6 & 2.6]

Key challenges, problems & opportunities

Most of the key challenges and problems listed in this Sub-sector fall into the areas of business models (US corporate take-overs, artist investment), new technologies (piracy, opportunities for new revenue streams), government interference and regulation, and training and education. In the latter, there were calls for training and education to cross-pollinate, to address over-subscription and lack of jobs as well as low salaries, and to engage in and provide relevant training specific to Sub-sector needs. Voluntary workers expressed specific needs, such as the availability of funding and training in this area.

Perceptions of existing training & education

Although formal education is seen to have some potential in addressing key skills and the main problems (labour market issues, barriers to recruitment and future opportunities) the Sub-sector by and large was hesitant about the effectiveness of accredited qualifications. Degree courses overall received a rating of quite / moderately effective, followed closely by postgraduate qualifications. HND / HNC and vocational courses were viewed very differently indeed, and a picture emerged of these types of qualifications being much dependent on context and specific Sub-sectors' training needs.

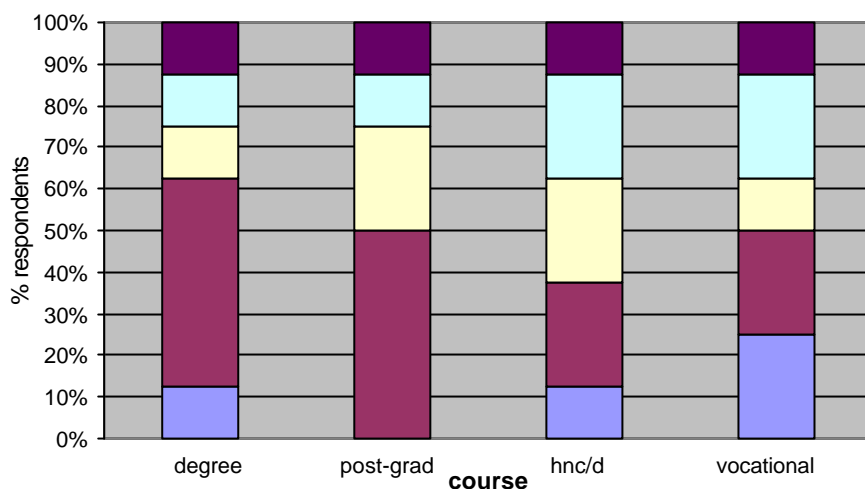
62% of interviewees in this Sub-sector thought that degree courses ranged from between very effective to moderately or quite effective. This compares with vocational courses being rated very effective or moderately / quite effective by altogether 50% of interviewees.

In the case of postgraduate qualifications, no one thought they were very effective, but 50% thought these were moderately or quite effective.

Finally, 37% thought that HND / HNC courses were either very effective or moderately / quite effective.

What is extremely interesting in this Sub-sector, is the striking difference in perception of accredited qualifications when broken down into companies versus industry organisations: 50% of companies thought that degree courses were very effective, compared with 0% of industry organisations, 67% of whom regarded these as merely moderately or quite effective.

SsC – Attitudes towards the Efficacy of Current Training Provision at Delivering Key Skills



KEY

- Depends on Course
- Unsure/No Comment
- Ineffective
- Very Effective
- Moderately/Quite Effective

2. Interface with a new SSC

Key messages:

Overall the reaction to a new SSC was "lukewarm" particularly in relation to comments on relationship, interaction & commitment

- A new SSC must be industry led
- SSC's activities should include a mapping exercise of existing training, the formalisation of qualifications & research into inefficient industry models
- A new SSC should help provide more flexible training, especially non-full time courses
- Help training associations develop management skills for the Sub-sector
- Operate "one-stop shop" model for different entry points to aid progression routes
- Provide help with funding & accreditation
- SSC should improve cross-Sub-sector communication & understanding, helping to promote the Sub-sector to the media, and help with funding

- Collaboration and advice are on offer; seconding human resources receives possible support, Financial contributions to a new SSC are not forthcoming

Level of support and contributions to a new SSC

Compared with the overall positive and highly supportive outcomes from other Sub-sectors surveyed in this research exercise, Sub-sector C's general response to both prompted and unprompted potential future interfaces with a new SSC may be called disappointing.

Only 5 out of 13 prompted options for future SSC activities received a clear rating of support of high or very high (compared with an average of between 8 and 9 in other Sub-sectors), and some of the unprompted comments on the level of contributions and commitment to a new SSC were decidedly reserved.

It should be noted that the top chosen initiatives received an uncharacteristically high rating (compared with highest ratings in other Sub-sectors surveyed in this exercise). They were: Providing support funding for existing Sub-sector schemes and investment in existing trade association initiatives.

SsC – level of interest in future SSC support

Type of Support	Yes	Probably	Maybe	Unlikely	No	NC
Financial	13%		13%	37%	37%	
Advisory	75%		25%			
Collaborative	80%	20%				
Resource secondment	62%		25%		13%	

Statements & issues:

On Training and Education

- "Definitely scope for degree development."
- "Higher education endows graduates with transferable skills and lateral thinking"
- "Graduates not having done homework or not having clear objectives." is a barrier to employment
- "More musicians need MBAs ..."
- "Progression routes need to be better defined, i.e. business graduates coming into SMEs."
- "Training needs to come from within the Sub-sector",
- "Resistance to off-the-shelf packaged education ..."

On the Industry

- Being good at being your own boss" is crucial.
- You are either born an agent or you're not.
- "Those surviving are the most creative at addressing difficulties."
- "People hire people like themselves, which narrows the talent pool ..."
- "Pay in the sub-sector was poor."
- "Self-confidence, the ability to take responsibility, and self-assuredness."
- Employees had to be prepared "to not clock watch."
- Things were changing "hugely, from sales to web-based incomes across the industry."
- Increasingly the leisure time of the over-50s age group that was becoming important
- Large US companies were buying up several members and thus shrinking the Sub-sector.
- The ability to see "globalisation as an opportunity, not a threat
- (The internet) "gives managers, artists and small companies ... back some of the control ...(of) their own copyright and their artists" (careers)
- Populated 99.9% by micro-businesses - not even SMEs
- "The ability to adapt to the restrictions placed on agents by the government,

On a new SSC

- Could not do anything at all to help particular agendas.
- Needed to ensure that "there is funding from somewhere"
- Might invest in existing accredited courses, create awareness of realistic expectations for employment, provide support funding for existing Sub-sector schemes, and invest in existing trade association initiatives
- SSC awareness of intellectual property rights...could probably benefit the sub-sector as a whole.
- Commitment to a new SSC would be "minimal" but "SSC Attitude is essential ..."
- "Financial assistance from an SSC would help ..."
- SSC should work "closely with the industry and training associations to develop support programmes to support international trade projects."
- "Firstly formalise qualifications"

SUB-SECTOR D

Live Performance

(Comprising the live performers trade representative organisations)

SUMMARY & QUALITATIVE ANALYSIS

Top five (unprompted) skills for sub-sector D :

1. Communication skills
2. Performance skills
3. Admin / organisation
4. Finance
5. Marketing

Recommendations for a new SSC (Sub-sector D):

- **SSC should work with existing training providers and lobby on behalf of training initiatives.**
- **In the area of funding, a new SSC should**
 - secure funding (groups) to provide training
 - address the provision of training currently limited by (non)availability of funding
 - assist sub-sectors with the process of fundraising for new training initiatives
- **A new SSC should additionally**
 - identify best practice and training needs
 - identify future developments in the area of technology in different sub-sectors
 - identify future sub-sector trends generally
 - help with the availability of training and effective pathways into training
 - help people re-train, particularly with (self) marketing & promotion in the freelance sub-sector
 - concentrate on short courses rather than full-time training models
 - promote the realities of working life in the music industry and specific sub-sectors
 - promote the acquisition & application of transferable and additional skills
 - recognise sub-sector differences
 - listen to and consult with sub-sectors, refrain from imposing agendas on sub-sectors & be employer / industry led

SUMMARY & ANALYSIS SUB-SECTOR D

Live Performance

1. Skills and Training

Key messages:

- Key skills are interpersonal, freelance, business & performance skills
- Future skills focus on business, management, marketing, freelance & transferable skills, and new technology
- MBAs and vocational courses are seen as quite favourable
- Main problems & challenges are in the area of new technology, over-subscription & freelance skills
- Barriers to recruitment are skills shortages, over-subscription & lack of additional (transferable) skills

Key skills current & future

The most important unprompted key skills in this sub-sector were communication skills, including diplomacy, interpersonal & presentation skills; and performance skills. These were closely followed by administrative / organisational skills (including time management and fundraising), and finance (including budgeting, freelance skills, taxation, accounting, and charity). Marketing, leadership skills (including creative direction & encouragement, and crowd control) were also important, as were general business skills & awareness, and negotiating skills.

Other useful key skills were coping under pressure, education, outreach & teaching, event management, and flexibility - which included multi-functionality (also defined in terms of freelancing and "portfolio life") and (professional) diversification]. *Five out of these most important unprompted key skills can also be found in the Top Ten of Key Skills for the entire research exercise.* They are communication skills (highest ranking in both cases), performance, administration & organisation, finance, management and business skills & awareness.

In terms of prompted hard skills, the most important were time management, technical skills (including music technology & performance), copyright, contracts, IT literacy, managerial skills, accountancy & finance (including tax, self-employment, and budgeting), secretarial and administration.

The three most highly rated soft skills in this sub-sector were attitude, communication skills, and team-working skills; closely followed by creativity (including "thinking on your feet"), (self)presentation skills. [See Appendices 1.7 & 2.7].

Key challenges, problems & opportunities

These fell mainly into five areas; notably, new technology including new media, new media rights and copyright, changing industry landscapes including changing working conditions, the fragmentation of the industry and its different key needs and demands, over-subscription, and education & training. Freelancing issues and "portfolio life" were also frequently mentioned as future opportunities, and in this context, a perceived shortage of business and management skills was highlighted. Funding was another major concern.

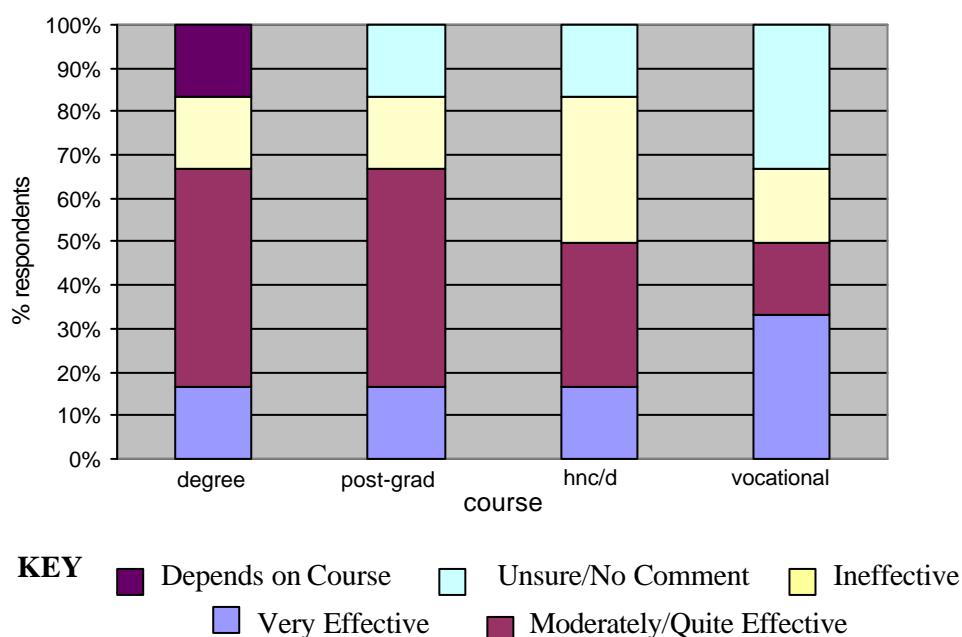
In the area of training & education, there were calls for the industry "to speak as one" - a desire encountered in several other sub-sectors surveyed in this research exercise - as well as improved co-operation with other industries and sub-sectors, and the delivery of practical training.

Perceptions of existing training & education

In this sub-sector, degree courses and postgraduate degree courses were viewed almost identically. Percentage-wise, 18% rated them very effective and 50% as quite or moderately effective. *This makes this sub-sector overall more favourably disposed to postgraduate degree courses than most other sub-sectors.* MBAs in particular were seen as potentially very useful. HND/ HNC courses fared less well, whilst vocational courses received a particularly high very effective rating of 32%.

It should be noted that some interesting qualifying comments were made on (post)graduate qualifications. These included, for example, the acknowledgement that such courses were very effective in opening up ways into the industry, but also the question of whether they actually delivered the specific key skill needed for various sub-sectors (for further details, see below).

SsD – Attitudes towards the Efficacy of Current Training Provision at Delivering Key Skills



2. Interface with a new SSC

Key messages:

- Overwhelming support for a new SSC with few reservations
- High willingness to contribute in advisory & collaborative capacity
- SSC should develop appropriate working culture and be industry-oriented in its interaction with sub-sectors
- SSC should address access to funding, training needs & re-skilling, and freelance specific issues
- SSC should have a promotional & information based role, rather than a (training) provision role
- SSC should address training and routes into training
- SSC should work with existing providers & facilitate cross-sub-sector understanding & initiatives
- Barriers to recruitment centre on over-subscription & shortage of business & management skills
- Future key skills are identified as transferable & career management skills, business & "ancillary" skills, and new technology

Level of support and contributions towards a new SSC

Both the level of support and commitment to a new SSC, and the willingness to interact with / contribute to a new SSC were overall very high in this sub-sector. 8 out of 13 available prompted options received a high level of support, with only 3 options attracting a low level of support. Unprompted suggestions on how a new SSC might operate in future were numerous, both in specific and general terms. *It is perhaps appropriate to say that there was more unconditional support for a new SSC in this sub-sector than in other sub-sectors surveyed.*

In terms of unprompted suggestions in this sub-sector, a focus on and preoccupation with issues surrounding freelance life and associated specific training and education needs was noticeable. *This tied in with other sub-sectors expressing concern in this area and with a general trend in recognising changing professional identities.*

Creating awareness of realistic expectations for employment received the highest rating from the list of options of prompted future SSC activities followed by support for cross sub-sector initiatives. *Again, this was consistent with many other sub-sectors surveyed who also considered this option one of the priorities in addressing over-subscription, which was a common refrain of concern in most sub-sectors [See Appendix 5.2].*

Finally, the sub-sector's willingness to contribute in various ways to a new SSC could be described as encouraging.

SsD – level of interest in future SSC support

Type of Support	Yes	Probably	Maybe	Unlikely	No	NC
Financial	13%		33%	17%	33%	
Advisory	100%					
Collaborative	83%					17%
Resource secondment	33%		33%	17%		17%

Statements & issues:

On Training & Education

- "Degree courses .. provide key skills", MBAs are "very important", "HNDs are unusual in this sub-sector ..."
- Over-subscription of highly qualified, experienced performers, (but a) lack of teachers
- Need for transferable skills

On the industry

- For musicians, the key skill was "first and foremost performance"
- Organisational skills were important, as was the ability to "think on your feet",
- "Technological awareness is key"
- For performers, there was a need "to understand how business works"

On a new SSC

- "Needs to have greater understanding and know how to listen"

SUB-SECTOR E

Recorded music including production & engineering

(Comprising the record company trade organisations, studio recording environment trade organisations, the master recording royalty collection society, record companies and freelance workers)

SUMMARY & QUALITATIVE ANALYSIS

Top five (unprompted) skills for sub-sector E :

1. Communication skills
2. Technical skills
3. Motivation / drive
4. Flexibility
5. Business skills & awareness / creativity

Recommendations for a new SSC (Sub-sector E) :

- **Introduce a centralised nation-wide accreditation system for training and education in the music industry, including a rating mechanism for best practice and efficacy / excellence based on industry needs**
- **Set up a centralised database with comprehensive information on**
 - existing training provision and available courses including indicators for best practice and efficacy
 - search facilities for employers with details of CVs and portfolios to help recruitment at entry level
 - centrally managed work placement schemes
- **Support cross sub-sector initiatives and facilitate cross sub-sector awareness, knowledge and understanding**
- **Re-evaluate main rationale behind work placements and re-model their implementation and management specifically addressing length of time, monitoring, mentoring and evaluation**
- **Extend delivery, or support existing delivery of, short targeted courses both at entry and career development stages with consideration for flexible delivery including time investment and location**
- **Extend, accredit, monitor and evaluate vocational apprenticeships**
- **Provide expertise and financial / human resources to help enable organisations to attract funding for training initiatives**

SUMMARY & ANALYSIS SUB-SECTOR E

Recorded music including production & engineering

1. Skills and Training

Key messages:

- Soft skills are invaluable; crucial for career progression, focus needs to be on transferable skills
- Technological change, economic factors, inter-sub-sector competition & erosion of resources are key challenges
- Entrepreneurship, change management strategies & flexible delivery of training are crucial
- 50% of the recording sub-sector rate degree courses and postgraduate qualifications as very effective
- Education and training concerns include lack of industry focus; gaps between contents and delivery of training and "real life"; and over-subscription

Key skills current & future

The current and future key skills deemed most important by interviewees in the recording sub-sector fall into three main categories: technical and new technologies, business skills (especially marketing) and crucially, so-called "soft skills." By identifying these areas as most crucial to education and training, the sub-sector's outcomes are mostly consistent with the overall unprompted key skills analysis of the entire research exercise.

6 out of these top 10 unprompted key skills for the whole research exercise are reflected here by the recording sub-sector: Communication skills are most important, followed by technical skills. Dedication / motivation / drive / ambition / commitment and flexibility come next, then business skills and creativity.

There are some notable differences between the key skills outcomes of the entire research exercise and the recording sub-sector. Unprompted, management skills are deemed the 6th most important for the whole research exercise, but in the recording sub-sector come only 13th. Finance, which is overall the 2nd most crucial skill, is only at 16th place in the recording sub-sector.

When prompted, a fuller picture of key skills in the recording sub-sector emerges, especially in the realm of hard skills. Time management comes top, followed by IT skills, strategic planning, managerial skills, technical skills, across industry and sub-

sector specific knowledge, contracts, web and new media skills, sampling issues and research skills.

The importance of soft skills cannot be over-estimated when analysing the results from the survey of the recording sub-sector. Unprompted, they include leadership and interpersonal skills, negotiating and influencing skills, 'attitude', self-awareness and self-reflection, and confidence building (both of self and others). In the prompted answers, individuality was rated most highly, followed by communication skills, networking, attitude, lateral thinking, teamworking, innovation, creativity, negotiating skills and leadership.

Perhaps one of the most interesting themes emerging from the recording sub-sector is the general agreement that while administrative and "on-the-job" skills are most important at entry level into the industry, soft skills become crucial at the career stages of progression, or moving between sub-sectors. There was also general agreement that career development significantly hinged on broad and sub-sector specific knowledge and understanding. Finally, at the point where soft and hard skills meet, entrepreneurial thinking and activities rated very highly on most interviewees' agendas in the recording sub-sector. [see appendices 1.8 & 2.8]

Key challenges, problems & opportunities

Change in the wider field of business and economics was listed by the overwhelming majority of interviewees as a key issue for the future. This impacted, not only on the day-to-day running of businesses and organisations, but also on education and training. The problems here were named as industry downsizing, mergers & acquisitions, erosion of resources including human and financial and accompanying career uncertainty, competition within the recording sub-sector, globalisation and its impact on the music industry, but also the opportunities associated with these developments. For example, commercial opportunities in the international arena of the music industry and in the realm of new technologies were frequently discussed by these interviewees.

Unsurprisingly, technological change featured high on the agenda of the recording sub-sector. Views in these areas were mixed, but the two main emerging messages are ; on the one hand, new technologies afford opportunities which must not be missed and which must be facilitated and supported by the right kind of targeted education and training. At the same time the entire music industry - and major record companies in particular - must embrace new technology (formats) and keep an open mind and flexible attitude towards these. The need was also expressed for smaller or independent players in the music industry to think and act in an entrepreneurial way.

On the other hand, new technologies were seen as a simultaneous threat to the well-being of the music industry (constant investment on upgrading technology and software, or the difficulty in deciding between engaging in specialised or broad industry services). Most of the recording sub-sector is in agreement that flexibility, adaptability and entrepreneurship are the future challenges in rising to technological change management. In the realm of education, these areas needed to be expressly addressed, mainly through the facilitation of self-management and promotion skills.

In this context, the desire for the music industry to design and implement flexible ways of delivering education and training - both in terms of time and location - was frequently expressed. It may be of interest that e-learning and interactive learning platforms were mentioned only twice. There was widespread awareness in this sub-sector of the rise of the portfolio music industry professional with a series of changing career phases. Most importantly, the facilitation and acquisition of transferable skills was a recurring refrain in the recording sub-sector.

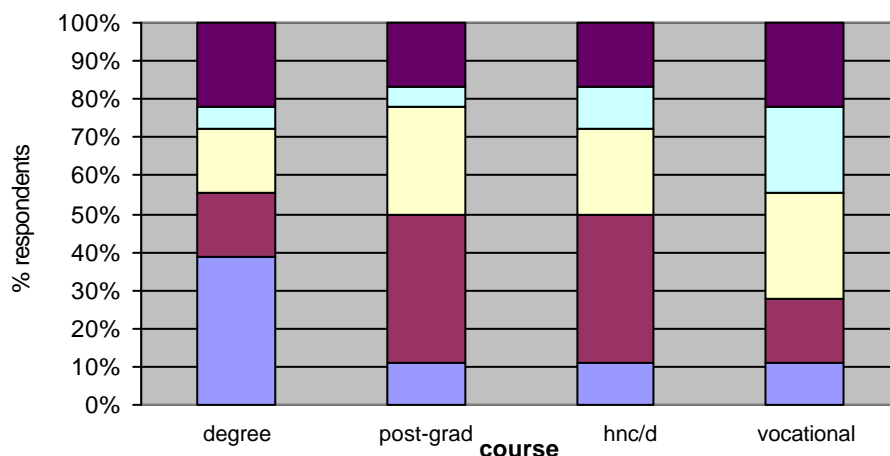
Perceptions of existing training & education in the music industry

One clear message emerges from this part of the research exercise: The recording industry is in favour of education & training. The majority cite examples of excellence in existing accredited (and, to a lesser extent, non-accredited) courses, and many employers already recruit regularly from institutions that deliver music related (postgraduate) degrees and vocational qualifications.

Just under 40% of the recording sub-sector as a whole rated degree courses as very effective, while just under 10% thought they were moderately or quite effective. Just over 10% thought postgraduate qualifications were very effective, with 40% rating them to be moderately or quite effective.

Just over 10% considered HNC/HND courses to be very effective, with just under 40% describing them as moderately or quite effective. Similarly, 10% rated vocational courses as very effective. *In summary, these figures show a good level of support for accredited education, but they also point to some significant perceptual differences in different areas of activity in the recording industry.*

SsE – Attitudes towards the Efficacy of Current Training Provision at Delivering Key Skills



KEY ■ Depends on Course ■ Unsure/No Comment ■ Ineffective
 ■ Very Effective ■ Moderately/Quite Effective

2. Interface with a new SSC

Key messages:

- Strong conditional support for a new SSC
- Willingness to contribute to a new SSC
- SSC must streamline education & training
- SSC must act as facilitator, communicator & unifier of the music industry & music industry education
- Key roles for SSC are monitoring, evaluating, rating & best practice
- SSC must encourage & implement cross-sub-sector communication & initiatives
- Core skills and customer service should be priorities

Additionally a new SSC should :

- Integrate, standardise & professionalise training in the music industry
- Raise the industry's educational status, prestige & credibility
- Focus on transferability of skills across sub-sectors

Level of support and contributions towards a new SSC

The recording industry can be described as showing a high degree of support for a new SSC representing the education and training needs of the music industry. It should be noted, however, that the majority expressed the desire that a new SSC should furthermore act on behalf of and represent the music industry's interests as a whole, including training provision. This representation was here variously described as "one voice" or "one vehicle". A new SSC must also be capable of addressing the specific, frequently differing, needs of sub-sectors within the music industry.

The overwhelming majority in the recording industry represented in this research exercise is willing to contribute in an advisory capacity or in collaboration with a new SSC. A good deal of willingness to second human and time resources - depending on the type of organisation or company and its overall availability of resources - is also forthcoming. The likelihood of contributing financially to a new SSC was overall more cautious in tone, although by no means entirely ruled out. Again, this depended very much on the type of organisation. However, one clear message was delivered throughout: Support - in whatever shape or form - is felt to be contingent on a variety of specific factors, all of which were in the power of a new SSC to address to its own

advantage. These factors included the adoption of a long-term-view and strategy for SSC activities and initiatives; organising itself - and communicating - effectively; obtaining the right kind of human representation - in other words, getting the right kind of personnel involved who possess credibility within the industry; listening to the industry and representing its true needs rather than vice versa; and, crucially, facilitating and implementing the right kind of activities based on the very premise of allowing itself to be industry led.

If these conditions were seen to be met, the recording industry's support for a new SSC was likely to be very high, and contributions forthcoming.

SsE – level of interest in future SSC support

<u>Type of Support</u>	Yes	Probably	Maybe	Unlikely	No	NC
Financial	11%	6%	11%	33%	33%	6%
Advisory	88%	6%			6%	
Collaborative	72%		11%		11%	6%
Resource secondment	43%	17%		17%	17%	6%

Statements & issues :

On Training and Education

- Need to teach "How to manage change ..."
- "Bums-on-seats agendas ..."
- "Degree courses show dedication to the subject ..."
- "Hands-on and creative ability is equal to academic qualifications ..."
- "Courses are written to get passed by education boards ..."

On the Industry

- Industry needs "a united voice ..."
- Self management is a key requirement for success ...
- "There is a perception that this industry is very rich - it isn't ..."
- "The industry seems to lack cross-sector knowledge ..."

On a new SSC

- "More direct influence over what an SSC might do ..."
- "There needs to be a central qualifications body for engineers ..."
- "Industry led and financed by the government ..."
- "Without SSC funding there is no hope ..."

SUB -SECTOR F

Retail & Distribution of Recordings

(Comprising the record retail trade organisation)

SUMMARY & QUALITATIVE ANALYSIS

Top five (prompted)* skills for sub-sector F :

1. Attitude
2. Individuality
3. Networking
4. Communication skills
5. Lateral thinking / Teamwork

* There were no unprompted skills responses for Sub sector F

Recommendations for a new SSC (Sub-sector F):

- **Create a "one stop shop" model for information gathering and sharing to prospective industry entrants & create a working model for recruitment.**
- **Facilitate cross-sub-sector communication and networking.**
- **Support / encourage the integration and centralisation of technological platforms.**
- **Address the lack of cross-creative industries, integrated organisation dealing with piracy across entertainment industries.**
- **Encourage / support the music industry's need to re-position itself as integral part of the wider creative industries.**

SUMMARY & ANALYSIS SUB-SECTOR F

Retail & Distribution of recordings

1. Skills and Training

Key messages:

- The most important current & future key skills reside in the areas of soft skills, business (marketing & finance) and new technology
- Risk and time management are also extremely important
- Across-industry approaches are desired, including a music industry re-positioning as part of wider creative industries
- Vocational courses are seen as more effective than other forms of accredited education

Key skills current & future

The most important prompted key hard skills were across industry / cross sub-sector knowledge, awareness and appreciation of copyright, knowledge of contracts, sampling issues and databases, strategic planning, IT literacy, time management, and Web & new media skills.

The sub-sector considered soft skills extremely important: Attitude, communication skills, creativity, innovation, leadership & leadability, negotiation and networking skills, problem solving, risk management, initiative and presentation skills, and teamwork all scored very high. Lateral thinking scored slightly less.

Two of the above tie in with the overall results in (unprompted) key skills from the entire research exercise: communication skills and across industry / cross sub-sector knowledge, with creativity close behind [see appendices 1.9 & 2.9].

*It should, however, be noted that **only one person** was interviewed in this sub-sector.*

Key challenges, problems & opportunities

These fell mainly into three categories: New technologies, current (and desired) business models, and the roles of artists and production.

In the area of new technology, there was an overall balance between perceived threats and perceived opportunities, *as could be seen in other sub-sectors, too*. The interviewee expressed grave concern over those activities that can be summarised largely as "Internet theft" of music - the illegal copying of music via file-swapping and other associated consumer practices on this new medium. It was highlighted here that one of the major problems in this area was consumer attitude which increasingly

viewed "free" downloading of music as acceptable. It was also suggested that, compared with investment in artists, the Internet had in the past perhaps received too much financial attention.

Artist innovation and investment in music production by (particularly major) record companies was another major concern in this sub-sector. It was felt that not enough priority was currently being given to this area of the industry, and this fed into other concerns in this sub-sector over current and future business models, which were, however, again linked to new technologies generally.

Integration of technological platforms, avoidance of consumer confusion with regards to new software and other consumer goods, the creation of a stable market place for growth, and the opportunities associated with DVD were all mentioned as crucial concerns for this sub-sector and the wider music industry. Crucially, one of the strategies suggested here (*and elsewhere in this research*) was for the music industry to begin to view itself as part of, and integrate with, the wider creative industries.

Finally, the future of retail was closely associated with the growing domination by multi-entertainment stores, which ultimately made retail more important. Another future development was identified in the rise of second-hand music shops. The main barrier to recruitment was listed as over-subscription. *This is a complaint that could be found through the entire research exercise, and across most, if not all, sub-sectors surveyed.*

Perceptions of existing training & education

The sub-sector expressed a number of concerns over current training provision. Over-subscription and lack of jobs were listed as major issues of concern not only for sub-sector F, but also across the whole of the music industry. Employee unsuitability was another problem, as was over-specialisation at early career stage.

The interviewee made a call for the industry to set up an integrated "first port of call" for educational and training issues and needs - *and is here consistent with many other such calls made across the entire research exercise. Only vocational courses received a rating of very effective (it may be necessary for any new SSC to address the areas of awareness building and information disseminating on available qualifications).*

SsB –Attitude towards the Efficacy of Current Training Provision at Delivering Key Skills*

Degree	Unsure / No comment
Post – grad	Unsure / No comment
HNC / D	Unsure / No comment
Vocational	Very effective

* Bar chart inappropriate as information was drawn from a single source

2. Interface with a new SSC

Key messages:

- High level of contingent support for future SSC initiatives & activities
- High level of willingness to contribute to a new SSC

In addition a new SSC should :

- Facilitate & help with training provision in this sub-sector
- Help with interviewing techniques & recruitment mechanisms
- Act as first port of call to prospective entrants to the industry
- Facilitate cross sub-sector communication, awareness, understanding & networking initiatives
- Produce education & information for entrants and the music industry

Level of support and contributions to a new SSC

This sub-sector's view of a new SSC's potential functions and activities mirrors its above mentioned major perceived problems, challenges, and concerns - especially in the areas of new technologies and future business approaches / models. A third area was that of education and training.

For example, it was repeatedly said that a new SSC should mainly act as an information source to prospective entrants into the sub-sector and the music industry generally. The notion of a "one stop shop" was evoked. A new SSC should generally support and facilitate training and education.

Furthermore, it should facilitate cross-sub-sector initiatives, communication, understanding, and networking. In the area of technology, it should facilitate and encourage the integration and centralisation of technological platforms.

SsF – level of interest in future SSC support

<u>Type of Support</u>	Yes	Probably	Maybe	Unlikely	No	NC
Financial					100%	
Advisory	100%					
Collaborative	100%					
Resource secondment			100%			

Statements & issues :

On Training and Education

- Career progression occurred through "hard work and in-house training, or externally learnt hard skills"
- "Applicants do not fit the jobs, especially since most in this sub-sector work their way up"

On the Industry

- Where moving between sub-sectors it was "luck, perseverance and the right person" that counted.
- "Many work their way up from a shelf filler at Tesco to the MD of HMV."
- "Need for the entertainment industries to view opportunities and challenges as common to them all - why isn't there one organisation that addresses piracy in music, video, games?"
- "We need to centralise so that all product lines sold in the entertainment industry are sensibly linked"

On a new SSC

- "New technologies, over-subscription, and new business models are the main issues of concern"

SUB -SECTOR G

Education & Training

(Comprising the music education and training representative organisations, and recruitment agencies)

SUMMARY & QUALITATIVE ANALYSIS

Top five (unprompted) skills for sub-sector G :

1. Communication skills
2. Admin / organisation
3. Business skills and awareness
4. Motivation / drive
5. Flexibility

Recommendations for a new SSC (Sub-sector G):

- **Undertake research in the areas of:**
 - Mapping existing skills & training provision including vocational courses
 - Identifying key generic (soft) skills for career progression & transferable skills
 - Cultural & ethnic employability & barriers to employment
- **Be active and supportive in the area of funding issues & promote to government funding bodies**
- **Engage in quality issues including: Quality assurance, Accreditation, Identifying & promoting best practice and Measuring objectives**
- **Helping with training & education through**
 - Exploring apprentice-style training models and building courses around these
 - Continuing with projects such as Metier's Creative Renewal Project
 - Facilitating & supporting cross sub-sector initiatives, communication & learning
 - Encouraging the creation of employment and being a networking tool
 - Addressing perceived gulfs between training & industry needs
 - Addressing the convergence between the popular and classical sub-sectors
- **Fulfilling a lobbying and PR role for the industry, education & training by:**
 - Engaging in promotion and ensuring information dissemination
 - Acting as, and unifying the industry to speak with, "one voice"
 - Promoting to government funding organisations
 - Initiating change at national level while representing at all levels
 - Creating a clear interface between music organisations and government

SUMMARY & ANALYSIS SUB-SECTOR G

Education & Training

1. Skills and Training

Key messages:

- Degree courses need to be vocational, relevant & industry oriented
- Vocational courses are deemed to best address CPD, but some accreditation & evaluation was needed
- Greater focus on hard skills for career progression than in other sub-sectors, but soft skills also key
- Type of training & course contents matter more than qualification
- It would be useful for training to cover teaching as well, especially for performers
- The balance between in-house & vocational training as well as employer / employee led CPD needs to be addressed
- Honing existing skills, CPD, and leadership skills important for career development
- Not enough knowledge about available qualifications

Key skills current & future

As is the case in most - if not indeed all sub-sectors - surveyed in this research exercise, Sub-sector G's most important unprompted key skill was communication, followed by administration & organisational skills and business skills & awareness.

Other key skills areas identified were dedication, motivation, drive, ambition & commitment; Entrepreneurship, initiative & resourcefulness; finance, flexibility, general hard & soft skills; industry and sub-sector specific knowledge. Management and performance received equal ratings.

Many of these unprompted key skills could also be found in the Top 10 rating of key skills for the whole research exercise across all surveyed sub-sectors.

Key challenges, problems & opportunities

As would be expected in this sub-sector, training & education featured high on the list of problems, challenges & opportunities. A quote by Community Music (CM) perhaps best introduces this area of concern. It said that a new approach had to be created to servicing the music industry and music education industry, "looking at key issues today, or why we are educationally and musically in a period of decline; there are clear answers, but they are not being absorbed".

Several further areas emerged in this sub-sector under challenges, problems & opportunities. They included: Current and future educational models, funding issues, freelancing & portfolio working, the integration of business skills into training, and general market changes within the industry and sub-sectors.

In keeping with CM's overall comment, many expressed concerns in the area of training & education. Broadening opportunities and employment generally; widening equal opportunities; recruitment and retention of instrumental teachers; access to, uptake, and continuation of instrumental learning; "courses for competence", professional expertise; HR shortages; salaries, hours, and working conditions; and apathy, stagnation, and people "feeling trapped" were just some of the major "sound bites" emerging from this sub-sector.

Views expressed on funding issues tied in with the above. There needed to be financial incentives capable of feeding into career paths, and the government needed to be clearer about its policies and agendas in the area of education and training. Related to funding, too, were calls for more awareness and integration of multi-cultural and social inclusion issues, and questions around the employability of ethnic minorities and the disabled.

There was a very strong awareness of professional development, CPD issues, and the "portfolio career" amongst most of the interviewees surveyed in this sub-sector. *This is consistent with many other sub-sectors, which also stressed the importance of this wider area for education & training.* Complaints were also made about the lack of cross Sub-sector communication.

Metier pointed out that the entire music industry needed to communicate more clearly exactly what type of training and education provision it desired in entrants, and generally; this had the potential to address another major area of concern, notably, the flexibility to move between sub-sectors. Multi-skilling was imperative in changing markets.

There were criticisms of a "fixed view of the (employment) market" and calls for its expansion "within existing frameworks, rather than novel ways. Others said there was "no solid base of employment" at all, and neither were there enough people of the right quality to employ. There was a need for training, which blended artistic, cultural, and creative elements (of performance) with business skills, as well as facilitating teamwork and project management skills.

The integration of business skills into current and future educational paths was indeed one of the most salient and common refrains in this sub-sector. Areas identified which presented further problems, challenges & opportunities and impacted on the teaching of related skills included IT, new technology (including the Internet and new

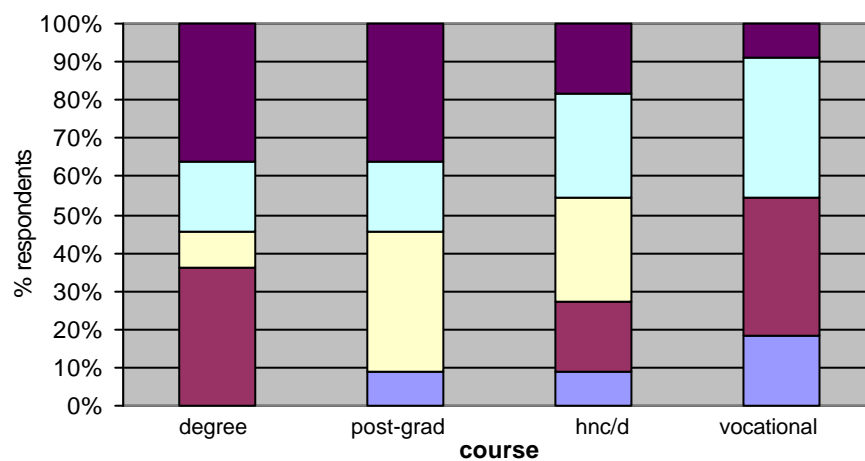
distribution channels) and its implications for key skills, copyright, and general market changes; *this tallies with other sub-sectors' views that the industry generally is facing, and ought to consciously identify and address, (pending) changes in its business models.*

Perceptions of existing training & education in the music industry

According to this quantitative analysis, no percentage of interviewees considered degree courses either very effective or ineffective, but 35% rated them to be moderately / quite effective.

Where postgraduate education was concerned, 8% rated this as very effective. HNC/HND courses received the same percentage for very effective ratings, but 20% also thought they were moderately or quite effective. Vocational courses received an 18% very effective rating, with 38% rating them at moderately or quite effective.

SsG – Attitudes towards the Efficacy of Current Training Provision at Delivering Key Skills



KEY ■ Depends on Course ■ Unsure/No Comment ■ Ineffective
 ■ Very Effective ■ Moderately/Quite Effective

2. Interface with a new SSC

Key messages:

- Fair level of support for an industry led SSC
- Advice, collaboration and some forms of contributions are forthcoming
- Main areas of suggested SSC activity are funding & accreditation, research into key skills, quality assurance, and cross-sub-sector learning & understanding
- Industry needs to be made aware of available courses
- The Internet, lack of jobs & lack of long-term artist investment are main problems & challenges

level of support and contributions towards a new SSC

The level of support and contributions to a new SSC by this sub-sector can be described as moderately high.

Commitment statements ranged from "the more politically active the sub-sector can be, the better", and on collaboration with a new SSC "not sure", to "lots of good will and enthusiasm" and "individually there is a lot of commitment, but where money is concerned, it is a slower process [...] it will take time to convince that it will happen".

<u>Type of Support</u>	Yes	Probably	Maybe	Unlikely	No	NC
Financial			27%	9%	46%	18%
Advisory	82%		9%			9%
Collaborative	73%		9%	9%		9%
Resource secondment	37%		27%	9%		27%

Key statements & issues :

On Training and Education

- "People like degrees and understand them in the wider world ..."
- "Degrees are highly desirable ..."
- "FE goes only so far in educating people ..."
- "No real accreditation or quality assurance methods ..."
- "CPD as a tool for acquiring new skills ..."

- "Transferable skills to be high-powered workers"
- "Soft skills are vital ..."

On the Industry

- Shrinking resources & "horrid surprises ..."
- "A 'messiness' which doesn't sit well with government ..."
- Employees "must develop an attitude receptive to change ..."
- "There are no clear mechanisms to do structured in-house training ..."
- "We do not understand what other sub-sectors need and do ..."
- Difficulty in identifying a market that "keeps changing ..."

On a new SSC

- "Follow on from this research ..."
- "Dialogue, dialogue, dialogue ..."
- "Get the industry heavily involved ..."

Mapping Existing and Planned Training Provision in the Music Industry

Qus. 5.A.1-7/5.B.1-3

This exercise addressed existing and planned training provision and investment in the music industry, specifically with a view to mapping how the industry collaborates with education in formal and informal training initiatives, directly and financially. The primary means for collating this information was originally to be the nine questions in sections 5.A and 5.B dealing with not only industry human, financial and time investment in training, but also where these programmes are located, to whom they are primarily targeted and who actually participates. Furthermore, it was intended that any instance of cross-(sub-)sector should be noted along with methods of user (student) progression evaluation/monitoring.

It became quite clear, however, throughout the course of the interviews that this information was, in fact, far harder to ascertain using this model than both the Steering group and research team first expected. This proved to be due to a number of reasons: primarily, lack of access to such information on the part of interviewees; secondly, the non-existence of figures/details in such a disaggregated form; and lastly, a reluctance to divulge such (often sensitive) information either on behalf of the company or, indeed, at all.

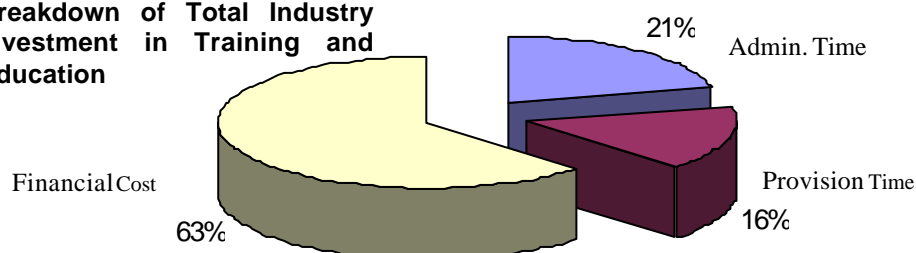
In order, then, to retrieve such information, it was necessary to research each company/organisation individually via secondary resources (largely web-based), the information from which was then augmented by another set of more focused, better targeted interviews with representatives from each company/organisation participating.

Summary of Findings:

Following the statistical analyses of estimated figures of investment in existing and planned training provision in the music industry, by those 55 companies and organisation interviewed, it can be suggested that:

- The estimated total investment in training provision in and by the music industry per year is significantly higher than £4.9 million
- A significant proportion of this investment constitutes human resource investment (37%), both in terms of training provision (16%) and time spent on administration of these initiatives (21%). Both areas of activity include the equivalent cost of voluntary work.

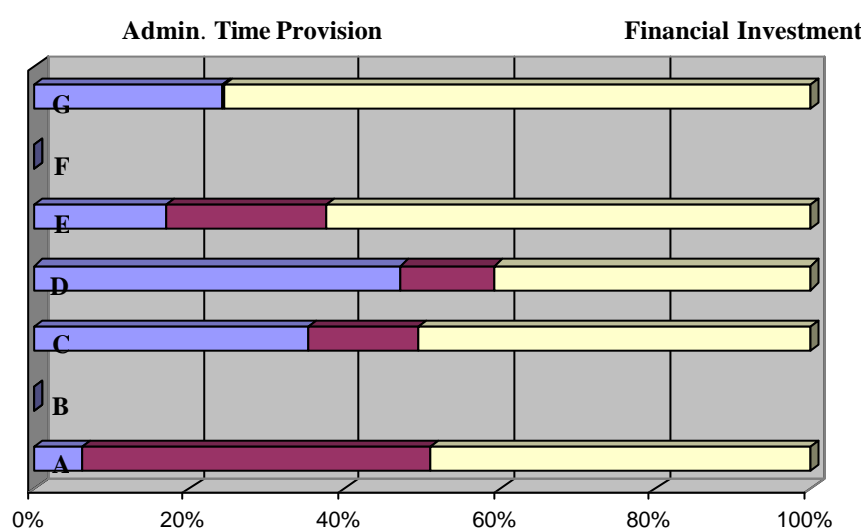
Breakdown of Total Industry Investment in Training and Education



- The estimated amount of investment per sub-sector is indicated in the following table:

	A	B	C	D	E	F	G	TOTAL
£ Admin. HR*	£ 79,415.64	£ -	£ 127,669.50	£ 179,883.72	£ 89,733.42	£ -	£ 573,210.00	£ 1,049,912.28
£ Provision HR*	£ 576,753.48	£ -	£ 51,484.68	£ 45,544.14	£ 107,242.38	£ -	£ 7,920.72	£ 788,945.40
£ Investment P/a	£ 629,000.00	£ -	£ 182,500.00	£ 155,600.00	£ 326,850.00	£ -	£ 1,789,000.00	£ 3,082,950.00
Total Investment	£ 1,285,169.12	£ -	£ 361,654.18	£ 381,027.86	£ 523,825.80	£ -	£ 2,370,130.72	£ 4,921,807.68

- While sub-sector G evidently invests the most overall in training provision (48% of total industry investment) - as perhaps expected due to the nature of work undertaken by the training and education sub-sector – it is interesting to note that, as a percentage of its overall investment, it does not provide training or industry expertise to anywhere near the extent that the other six sub-sectors do. In fact, between 10 and 50 percent of investment by the Publishing [A], Management [C], Performance [D] and Recording [E] sub-sectors involves training and expertise provision in initiatives. A break-down of the type of investment by each sub-sector is illustrated in the following chart:

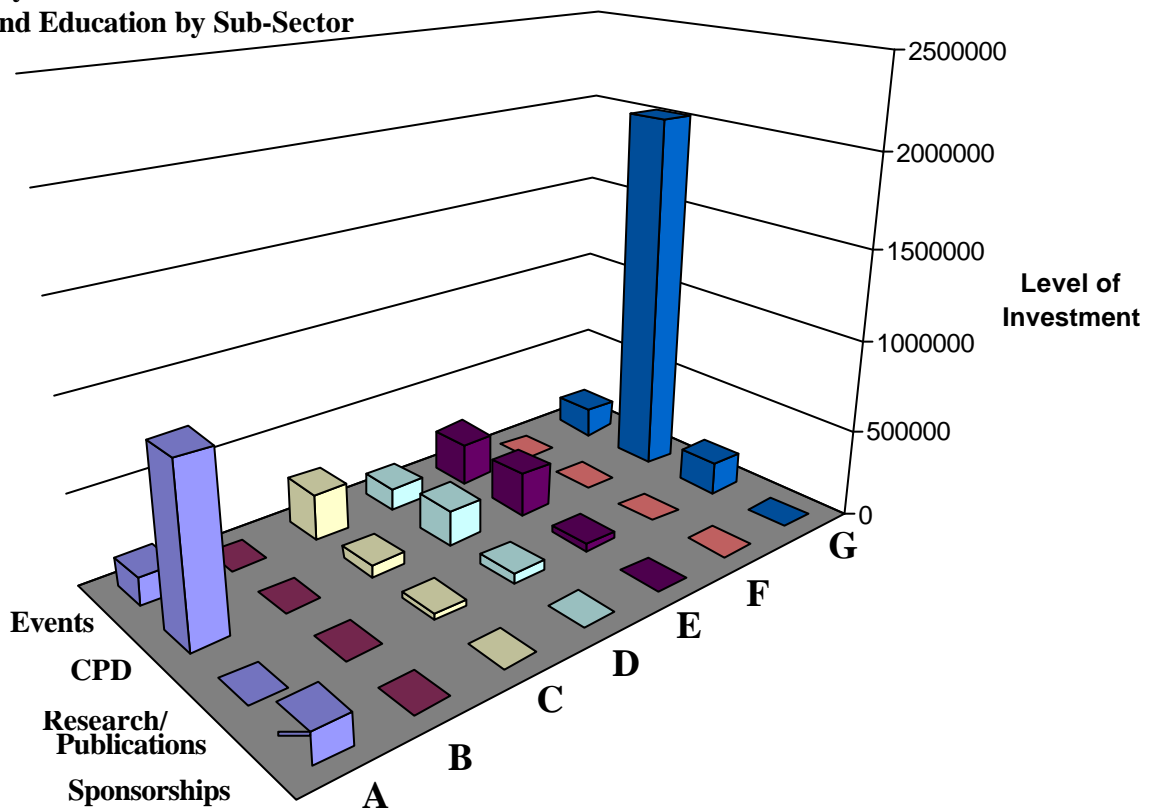


- Of those sub-sector indicating at least some investment (all except B and F), A, C, D and E each contributes 36% of their total investment in human resources [50%, 48%, 58% and 36% respectively], whereas almost 75% of sub-sector G's contribution comes in the form of direct financial investment. Again, it should be noted that research indicates that much of this human resource investment is voluntary and for a large part informal.
- With regards to the area of training in which the industry overall and each sub-sector invests most heavily, both the publishing and the education + training sector invest most heavily in long-term development programmes (including primary, secondary and tertiary-based formal education work), it constituting, in fact, over 85% of sub-sector G's investment activity.
- Investment and involvement in various events constitutes just under 12% (of £1.285 million), 71% (of £362,000), 33% (of £381,000) and 46% (of £523,825) of sub-sectors A, C, D and E's overall training activity, whereas

sub-sector G is less involved in this capacity (6.7% of an overall £2.37 million).

- It is also interesting that, of these amounts, around 80% of both sub-sectors A and E's investment in events is in direct skills-based training activity (incl. seminars); with sub-sector D contributing £82,500 of their overall investment to such activities, and C and G contributing £81,000 and £59,000 of their overall expenditure respectively to direct skills-based training events.
- The complete break-down of sub-sector investment in each area of training provision is illustrated in the chart below:

Total Industry Investment in Each Area of Training and Education by Sub-Sector



Methodology

Each initiative was first listed according to a relatively crude (yet comprehensive) categorisation system comprising of the following four main areas:

Taxonomy:

- Events
- Education and Training Programmes (incl. from primary to tertiary formal education, CPD programmes and development work)
- Research + Publications
- Sponsorship

Within each category, initiatives were then further grouped by way of each initiative's content or objective, and arranged by sub-sector. [A full taxonomy can be found in Appendix 7.2]. Each initiative currently running (at the time of interview) and in the planning stages (to be implemented at some point in the next 18 months) was then plotted onto this map. The following information was then mapped in the same way for each organisation/company:

- Location of initiative
- Number of initiatives per year (referring for the main to event)
- Financial investment per initiative per year
- Administration time (in days) spent on each initiative per year
- Amount of provider time spent per initiative per year (ie. number of days spent delivering a course, mentoring etc)
- Number of participants/users per initiative per year (incl. number of recipients of, for instance, a published business manual; number of on-line directory users; number of attendees registered on a course)

Statistical Analysis:

1. Number of Participants

The number of participants was measured by multiplying the indicated average number of attendees per type of initiative by the number of times that initiative ran per year (i.e. average attendance of 25 x average number of 4 initiative per year = 100). Again, if the overall estimated figure superseded the combined number of participants for those initiatives attributed a estimated number of users, the remainder was divided among all remaining initiatives.

2. Number of initiatives per year/Location

The number of initiatives per year was used, primarily, to calculate the overall financial investment by each company/organisation. But, in any further analysis, once an overall expenditure per company/organisation per initiative had been calculated, each initiative was then treated as singular.

With regards to location, it is notable that the majority of initiatives were sited as taking place either a) in London (varying sites and HOs) or b) across the UK/in various locations from year to year. Those regularly taking place in specific cities other than London were almost negligible, while more initiatives (primarily seminars and annual conferences) alternating site from year to year were 'planned.'

3. Investment

Where interviewees had indicated the (estimated) financial cost of one or more specific initiatives per company/organisation per year, this figure was plotted on the map. If, however, there were a number of additional initiatives mapped, and there was an investment surplus (where the total figure of investment given supersedes the sum of each individual amount), it was divided equally between the remaining initiatives per company/organisation.

4. Administration / Provision Time

The estimated amount of time invested in the actual delivery/provision of initiatives (as trainer, mentor, panel/committee/seminar member etc), and in any other capacity (admin. & all other HR) was measured (in hours) per initiative (where indicated specifically) and the remaining figure divided equally among all other initiatives per company/organisation. Full-Time Equivalence (FTE) was measured as a typical average of 250 days (out of 365) per year. A an average day was measured as 7 hours.

Financial cost of time invested was calculated using the most recent New Earnings Survey figure (April 2002) of £ 26,055 for the average income of those working in the Recreational, Cultural and Sporting Activities Sector (ref: SIC92). I.e. a total of 127 days in total spent on administration of current and planned training provision per year is estimated to cost:

$$127/250 \times 26055 = \text{£ } 13,235.94$$

number of days/av. Days (FTE) x av. Wage = total spending

A combined FTE figure for both admin. and provision was calculated per descriptive, and then added to the aforementioned financial investment figure to calculate a total FTE figure was then also calculated for each descriptive.

	A	B	C	D	E	F	G	TOTAL
Admin. HR (in days) P/a	762	0	1225	1726	861	0	5500	10074
Provision HR (in days) P/a	5534	0	494	437	1029	0	76	7570
Total HR (days) P/a	6296	0	1719	2163	1890	0	5576	17644
Admin. HR (fte 250/365)	3.048	0	4.9	6.904	3.444	0	22	40.296
Provision HR (fte 250/365)	22.136	0	1.976	1.748	4.116	0	0.304	30.28
Total HR (fte 250/365)	25.184	0	6.876	8.652	7.56	0	22.304	70.576
Cost Admin. HR*	£ 79,415.64	£ -	£ 127,669.50	£ 179,883.72	£ 89,733.42	£ -	£ 573,210.00	£ 1,049,912.28
Cost Provision HR*	£ 576,753.48	£ -	£ 51,484.68	£ 45,544.14	£ 107,242.38	£ -	£ 7,920.72	£ 788,945.40
Total HR £ *	£ 656,169.12	£ -	£ 179,154.18	£ 225,427.86	£ 196,975.80	£ -	£ 581,130.72	£ 1,838,857.68
Total £ Investment P/a	£ 629,000.00	£ -	£ 182,500.00	£ 155,600.00	£ 326,850.00	£ -	£ 1,789,000.00	£ 3,082,950.00
TOTAL £ INVESTMENT P/A	£ 1,285,169.12	£ -	£ 361,654.18	£ 381,027.86	£ 523,825.80	£ -	£ 2,370,130.72	£ 4,921,807.68

These amounts were then collated to indicate estimated investment by sub-sector for each *area* of initiative – both aggregate and the more specific *types* of initiative.

Implications + Evaluation:

First and foremost, it should be noted that some figures for financial investment may well include costs for human resources while, on the other hand, some figures, when given as a total amount invested in a particular project, may include actual cost and total human resources. These figures have been disaggregated as much as is possible (where, for instance, actual hours spent per year has been offered and it is therefore possible to calculate the cost of an initiative *minus* HR).

Furthermore, as indicated above, the total figures for each sub-sector are reliable only to the degree that they represent the *estimated* amount invested by only *some* of those organisations and companies within that sub-sector, as there are more cases - across the entire map - of incomplete estimates than there are not. Moreover, it is also noteworthy that, even where interviewees were speaking on behalf of companies (as opposed to trade organisations), there was often insufficient knowledge of the actual amounts spent by the commercial sector on training and education. Interestingly enough, it was the larger companies that tended to have to estimate financial figures of investment.

Due to the ratio of trade organisations to companies, it must be noted that many of the initiatives proffered over the course of this exercise are substantially, if not entirely, funded by these organisations – occasionally comprising member / attendee donations/contributions, and public (and increasingly industry-based) funding. These organisations are often under-resourced, with a *staple* proportion of the total financial investment in initiatives consisting of unpaid / voluntary human resources. Furthermore, these organisations are, in this case, speaking from a position only *relative* to the members they represent – and therefore, are perhaps not best placed to offer estimates of investment for the wider communities in their sub-sectors. This suggests that, despite an impressive figure of overall estimated investment (of £4,921, 807.68) in training and education across the industry, the reality of this figure is almost certainly *far* higher.

It is recommended by the research team and, in fact, supported in the research [see qu. 3D re: potential activity appropriate for a new SSC] that one area in which further mapping activity should be implemented as an adjunct to, or development of, this exercise, would be to further explore the commercial investment in CPD programmes, as well as in-house training and collaborations across sub-sectors and between industry and education (as instigated by the Music Education Directory). This would, at its most basic level, demand a more transparent approach to the nature and intricacies of financial investment by industry in training and education, while all agents involved *in any way* in providing or utilising training / education services must be willing and encouraged to chart their own involvement in such initiatives. This recommendation, it should be noted, is reflective of the music industry's wish to further solidify, renew and maintain the relationships between industry and education towards reaching a more centralised, better managed, and transparent model of training and commercial practice.

APPENDICES

- Appendix 1** Unprompted key skills
- Fig 1.1 – 1.3 Total industry / trade orgs / companies
 - Fig 1.4– 1.9 Sub-sectors A - G
- Appendix 2** Prompted key skills
- Fig 2.1 Total industry / soft skills / hard skills
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- Appendix 3** Key skills and future challenges / Investment by sub sector
- Fig 3.1 Key skills and future challenges by sub sector
 - Fig 3.2 Investment in training and education by sub sector
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 - Fig 7.2 Trade organisations and companies consulted
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Appendix 1

Total Industry (unprompted) key skills desired

on entry rated by importance (in no. of mentions)

Fig 1.1

ENTIRE INDUSTRY	
COMMUNICATION (inc. client, staff r/ts; diplomacy; groups; interpersonal; presentation; public speaking)	49
FINANCE (incl. budgeting; freelance; taxation/accounting; charity)	18
ADMIN/ORGANISATION (incl.time management/fundraising)	17
TECHNICAL - all	16
FLEXIBILITY (incl. multifunctionality/diversification)	13
MANAGEMENT - all	15
BUSINESS SKILLS + AWARENESS	14
INDUSTRY/SECTOR K (incl. public/arts)	14
MARKETING - general	13
PERFORMANCE - all	13
CREATIVITY	11
DEDICATION/MOTIVATION/DRIVE/AMBITION/ COMMITMENT	9
IT (incl. Internet) - general	8
LEADERSHIP (incl. creative direction, encouragement, crowd control)	8
LEGAL - basic	8
GENERAL HARD/SOFT - transferable competencies	7
LITERACY (incl. public documents)	6
MUSICOLOGY/MUSICAL LITERACY	6
NEGOTIATING	5
NUMERACY	5
SPECIALIST K /SUBJECT SPECIFIC SKILLS	5
EDUCATION/OUTREACH + TEACHING	4
ENTREPRENEURIALSHIP/INITIATIVE/RESOUR CEFULNESS	6
EXPERIENCE	4
HUMILITY/SELF-REFLECTION (incl. willingness to learn)	4
INFO. HANDLING/DATAPROCESSING	4
LATERAL THINKING/PROBLEM SOLVING	4
RESEARCH	4
EVENT MANAGEMENT	3
IT - advanced (inc. web construction/new media K)	3
LEGAL - rights/copyright/data protection	3
MARKETING - advanced (incl. media r/ts, sales)	3
MUSIC K	3
COPING UNDER PRESSURE	2
EDITORIAL SKILLS (incl. typesetting)	2
FOREIGN LANGUAGES	2
PASSION	2
PUBLISHING K	2
A+R	1
ANALYTICAL SKILLS (incl. musical critique)	1
COMMON SENSE	1
COMPOSITION - basic	1
CONFIDENCE	1
LICENSING + DISTRIBUTION	1
MUSIC INT	1
NETWORKING (incl. contacts)	1
OPEN-MINDEDNESS	1
R&D K (incl. new technology)	1
STRATEGIC PLANNING	1
TALENT	1

Fig 1.2

TOTAL ORGANISATIONS	
COMMUNICATION (inc. client, staff r/ts; diplomacy; groups; interpersonal; presentation; public speaking)	40
FINANCE (incl. budgeting; freelance; taxation/accounting; charity)	17
MANAGEMENT - all	13
PERFORMANCE - all	13
ADMIN/ORGANISATION (incl.time management/fundraising)	12
BUSINESS SKILLS + AWARENESS	12
MARKETING - general	11
FLEXIBILITY (incl. multifunctionality/diversification)	10
INDUSTRY/SECTOR K (incl. public/arts)	10
LEADERSHIP (incl. creative direction, encouragement, crowd control)	8
TECHNICAL - all	8
GENERAL HARD/SOFT - transferable competencies	7
DEDICATION/MOTIVATION/DRIVE/AMBITION/ COMMITMENT	6
IT (incl. Internet) - general	6
LEGAL - basic	6
LITERACY (incl. public documents)	6
SPECIALIST K /SUBJECT SPECIFIC SKILLS	5
EDUCATION/OUTREACH + TEACHING	4
ENTREPRENEURIALSHIP/INITIATIVE/RESOUR CEFULNESS	4
NEGOTIATING	5
NUMERACY	4
EVENT MANAGEMENT	3
EXPERIENCE	3
HUMILITY/SELF-REFLECTION (incl. willingness to learn)	3
INFO. HANDLING/DATAPROCESSING	3
LEGAL - rights/copyright/data protection	3
RESEARCH	3
COPING UNDER PRESSURE	2
CREATIVITY	2
FOREIGN LANGUAGES	2
LATERAL THINKING/PROBLEM SOLVING	2
MARKETING - advanced (incl. media r/ts, sales)	2
MUSIC K	2
MUSICOLOGY/MUSICAL LITERACY	2
A+R	1
COMMON SENSE	1
COMPOSITION - basic	1
CONFIDENCE	1
IT - advanced (inc. web construction/new media K)	1
LICENSING + DISTRIBUTION	1
MUSIC INT	1
NETWORKING (incl. contacts)	1
OPEN-MINDEDNESS	1
STRATEGIC PLANNING	1
TALENT	1

Fig 1.3

TOTAL COMPANIES	
COMMUNICATION (inc. client, staff r/ts; diplomacy; groups; interpersonal; presentation; public speaking)	9
CREATIVITY	9
TECHNICAL - all	8
ADMIN/ORGANISATION (incl.time management/fundraising)	5
FLEXIBILITY (incl. multifunctionality/diversification)	3
INDUSTRY/SECTOR K (incl. public/arts)	4
MUSICOLOGY/MUSICAL LITERACY	4
DEDICATION/MOTIVATION/DRIVE/AMBITION/ ON/ COMMITMENT	3
BUSINESS SKILLS + AWARENESS	2
EDITORIAL SKILLS (incl. typesetting)	2
IT - advanced (inc. web construction/new media K)	2
IT (incl. Internet) - general	2
LATERAL THINKING/PROBLEM SOLVING	2
LEGAL - basic	2
MANAGEMENT - all	2
MARKETING - general	2
PASSION	2
PUBLISHING K	2
ANALYTICAL SKILLS (incl. musical critique)	1
ENTREPRENEURIALSHIP/INITIATIVE/RESOUR CEFULNESS	2
EXPERIENCE	1
FINANCE (incl. budgeting; freelance; taxation/accounting; charity)	1
HUMILITY/SELF-REFLECTION (incl. willingness to learn)	1
INFO. HANDLING/DATAPROCESSING	1
MARKETING - advanced (incl. media r/ts, sales)	1
MUSIC K - broad	1
NUMERACY	1
R&D K (incl. new technology)	1
RESEARCH	1

List of Sub-Sector A-G Total(unprompted) desired key skills specific to each sector rated by importance (in no. of mentions)

Please Note, No Unprompted Key Skills are available for Sub-Sector F

Fig 1.4

Sub Sector A	
INDUSTRY/SECTOR K (incl. Public/arts)	6
LEGAL - basic	6
Musicology/musical literacy	6
Business skills + awareness	4
Creativity	4
COMMUNICATION (inc. Client, staff r/ts; diplomacy; groups; interpersonal; presentation; public speaking)	3
EDITORIAL SKILLS (incl. Typesetting)	2
FINANCE (incl. Budgeting; freelance; taxation/accounting; charity)	2
GENERAL HARD/SOFT - transferable competencies	2
IT - advanced (inc. Web construction/new media K)	2
IT (incl. Internet) - general	2
MARKETING - general	2
Publishing k	2
Research	2
ADMIN/ORGANISATION (incl.time management/fundraising)	1
ANALYTICAL SKILLS (incl. Musical critique)	1
COMPOSITION - basic	1
Info. Handling/dataprocessing	1
Lateral thinking/problem solving	1
LEGAL - rights/copyright/data protection	1
MANAGEMENT - all	1
NETWORKING (incl. Contacts)	1
Passion	1
Talent	1

55

Fig 1.5

Sub Sector B	
COMMUNICATION (inc. client, staff r/ts; diplomacy; groups; interpersonal; presentation; public speaking)	1
FINANCE (incl. budgeting; freelance; taxation/accounting; charity)	1
FOREIGN LANGUAGES	1
INDUSTRY/SECTOR K (incl. public/arts)	1
INFO. HANDLING/DATAPROCESSING	1
IT - advanced (inc. web construction/new media K)	1
IT (incl. Internet) - general	1
LITERACY (incl. public documents)	1
NUMERACY	1
RESEARCH	1

10

Fig 1.6

Sub Sector C	
COMMUNICATION (inc. client, staff r/ts; diplomacy; groups; interpersonal; presentation; public speaking)	7
FINANCE (incl. budgeting; freelance; taxation/accounting; charity)	5
MANAGEMENT - all	5
MARKETING - general	3
ADMIN/ORGANISATION (incl.time management/fundraising)	2
FLEXIBILITY (incl. multifunctionality/diversification)	2
INDUSTRY/SECTOR K (incl. public/arts)	2
LEGAL - rights/copyright/data protection	2
CREATIVITY	1
ENTREPRENEURIALSHIP/INITIATIVE/RESOURCE FULNESS	1
EVENT MANAGEMENT	1
GENERAL HARD/SOFT - transferable competencies	1
INFO. HANDLING/DATAPROCESSING	1
IT (incl. Internet) - general	1
LATERAL THINKING/PROBLEM SOLVING	1
LEGAL - basic	1
LITERACY	1
MUSIC K	1
NEGOTIATING	1
NUMERACY	1
SPECIALIST K /SUBJECT SPECIFIC SKILLS	1
STRATEGIC PLANNING	1

42

Fig 1.7

Sub Sector D	
COMMUNICATION (inc. client, staff r/ts; diplomacy; groups; interpersonal; presentation; public speaking)	11
PERFORMANCE - all	9
ADMIN/ORGANISATION (incl.time management/fundraising)	7
FINANCE (incl. budgeting; freelance; taxation/accounting; charity)	6
MARKETING - general	5
LEADERSHIP (incl. creative direction, encouragement, crowd control)	4
MANAGEMENT - all	4
BUSINESS SKILLS + AWARENESS	3
NEGOTIATING	3
COPING UNDER PRESSURE	2
EDUCATION/OUTREACH + TEACHING	2
EVENT MANAGEMENT	2
FLEXIBILITY (incl. multifunctionality/diversification)	2
COMMON SENSE	1
CREATIVITY	1
ENTREPRENEURIALSHIP/INITIATIVE/RESOURCEFULNESS	1
LATERAL THINKING/PROBLEM SOLVING	1
MARKETING - advanced (incl. media r/ts, sales)	1
TECHNICAL - all	1

66

Sub Sector G	
COMMUNICATION (inc. client, staff r/ts; diplomacy; groups; interpersonal; presentation; public speaking)	12
ADMIN/ORGANISATION (incl.time management/fundraising)	4
BUSINESS SKILLS + AWARENESS	3
DEDICATION/MOTIVATION/DRIVE/AMBITION/COMMITMENT	3
ENTREPRENEURIALSHIP/INITIATIVE/RESOURCEFULNESS	3
FINANCE (incl. budgeting; freelance; taxation/accounting; charity)	3
FLEXIBILITY (incl. multifunctionality/diversification)	3
GENERAL HARD/SOFT - transferable competencies	3
INDUSTRY/SECTOR K (incl. public/arts)	3
LEADERSHIP (incl. creative direction, encouragement, crowd control)	3
LITERACY (incl. public documents)	3
MANAGEMENT - all	3
PERFORMANCE - all	3
SPECIALIST K /SUBJECT SPECIFIC SKILLS	3
EDUCATION/OUTREACH + TEACHING	2
EXPERIENCE	2
CONFIDENCE	1
CREATIVITY	1
FOREIGN LANGUAGES	1
IT (incl. Internet) - general	1
MARKETING - advanced (incl. media r/ts, sales)	1
MUSIC INT	1
MUSIC K	1
NEGOTIATING	1
NUMERACY	1
PASSION	1

66

Fig 1.8

Sub Sector E	
COMMUNICATION (inc. client, staff r/ts; diplomacy; groups; interpersonal; presentation; public speaking)	15
TECHNICAL - all	15
DEDICATION/MOTIVATION/DRIVE/AMBITION/COMMITMENT	6
FLEXIBILITY (incl. multifunctionality/diversification)	6
BUSINESS SKILLS + AWARENESS	4
CREATIVITY	4
HUMILITY/SELF-REFLECTION (incl. willingness to learn)	4
ADMIN/ORGANISATION (incl.time management/fundraising)	3
IT (incl. Internet) - general	3
MARKETING - general	3
EXPERIENCE	2
INDUSTRY/SECTOR K (incl. public/arts)	2
MANAGEMENT - all	2
NUMERACY	2
A+R	1
ENTREPRENEURIALSHIP/INITIATIVE/RESOURCEFULNESS	1
FINANCE (incl. budgeting; freelance; taxation/accounting; charity)	1
GENERAL HARD/SOFT - transferable competencies	1
INFO. HANDLING/DATAPROCESSING	1
LATERAL THINKING/PROBLEM SOLVING	1
LEADERSHIP (incl. creative direction, encouragement, crowd control)	1
LEGAL - basic	1
LICENSING + DISTRIBUTION	1
LITERACY (incl. public documents)	1
MARKETING - advanced (incl. media r/ts, sales)	1
MUSIC K	1
OPEN-MINDEDNESS	1
PERFORMANCE - all	1
R&D K (incl. new technology)	1
RESEARCH	1
SPECIALIST K /SUBJECT SPECIFIC SKILLS	1

Fig 2.1 Total Industry (Prompted) Key Skills Desired on Entry rated by Importance: All skills / Hard skills / Soft skills

ALL	
ALL SKILLS	
empathy of what others are trying to achieve	1.00
individuality	1.00
knowledge of sector context	1.00
passion	1.00
Patience	1.00
problem solving/risk management/initiative	1.00
study skills	1.00
communication skills	1.05
attitude	1.08
teamworking skills	1.09
creativity (incl. client r/ts, thinking on feet)	1.30
lateral thinking (incl. problem solving)	1.30
networking	1.32
time management	1.33
innovation (incl. ability to adapt quickly to change + take risks + grow your job)	1.37
IT literate (incl. commn)	1.39
negotiating skills	1.40
presentation skills	1.46
being an anorak!	1.50
leadership & leadability	1.58
strategic planning	1.60
across industry/cross sector K	1.61
contracts	1.65
technical skills (incl. music tech/perf; outsourcing; rigging/tech spec; Qbase; basic music training; performance)	1.65
managerial skills	1.70
copyright (awareness/appreciation/outsourcing)	1.75
Web & new media skills (construction/web development out-sourced)	1.79
secretarial / admin	1.87
sampling issues	1.96
knowledge of music	2.00
accountancy & finance (inxl. own tax, selfemployment + budgeting + K of source)	2.03
A& R / promotions	2.07
research skills	2.15
databases	2.22
foreign languages	2.43

ALL	
SOFT SKILLS	
empathy of what others are trying to achieve	1.00
individuality	1.00
knowledge of sector context	1.00
passion	1.00
Patience	1.00
problem solving/risk management/initiative	1.00
study skills	1.00
communication skills	1.05
attitude	1.08
teamworking skills	1.09
creativity (incl. client r/ts, thinking on feet)	1.30
lateral thinking (incl. problem solving)	1.30
networking	1.32
innovation (incl. ability to adapt quickly to change + take risks + grow your job)	1.37
negotiating skills	1.40
presentation skills	1.46
leadership & leadability	1.58

ALL	
HARD SKILLS	
time management	1.33
IT literate (incl. commn)	1.39
being an anorak!	1.50
strategic planning	1.60
across industry/cross sector K	1.61
contracts	1.65
technical skills (incl. music tech/perf; outsourcing; rigging/tech spec; Qbase; basic music training; performance)	1.65
managerial skills	1.70
copyright (awareness/appreciation/outsourcing)	1.75
Web & new media skills (construction/web development out-sourced)	1.79
secretarial / admin	1.87
sampling issues	1.96
knowledge of music	2.00
accountancy & finance (inxl. own tax, selfemployment + budgeting + K of source)	2.03
A& R / promotions	2.07
research skills	2.15
databases	2.22
foreign languages	2.43
editorial training	2.49
print production & design (awareness of/eye for)	2.53

Fig 2.2 & Fig 2.3 (Prompted) Key Skills Desired on Entry rated by Importance

ALL ORGANISATIONS	
ALL SKILLS	
empathy of what others are trying to achieve	1.00
individuality	1.00
knowledge of sector context	1.00
Patience	1.00
problem solving/risk management/initiative	1.00
study skills	1.00
attitude	1.03
communication skills	1.07
teamworking skills	1.11
creativity (incl. client r/ts, thinking on feet)	1.29
IT literate (incl. comm)	1.29
lateral thinking (incl. problem solving)	1.31
innovation (incl. ability to adapt quickly to change + take risks + grow your job)	1.35
negotiating skills	1.36
presentation skills	1.36
time management	1.38
networking	1.43
being an anorak!	1.50
contracts	1.55
technical skills (incl. music tech/perf; outsourcing; rigging/tech spec; Qbase; basic music training; performance)	1.55
leadership & leadability	1.56
across industry/cross sector K	1.61
managerial skills	1.62
copyright (awareness/appreciation/outsourcing)	1.62
strategic planning	1.66
Web & new media skills (construction/web development out-sourced)	1.73
secretarial / admin	1.84
accountancy & finance (incl. own tax, selfemployment + budgeting + K of source)	1.96
sampling issues	1.98
knowledge of music	2.00
A & R / promotions	2.14
research skills	2.17
databases	2.34
foreign languages	2.38
Print production & design (awareness of / eye for)	2.50
Editorial training	2.63

ALL COMPANIES	
ALL SKILLS	
communication skills	1.00
passion	1.00
teamworking skills	1.06
networking	1.11
attitude	1.17
Time management	1.24
lateral thinking (incl. problem solving)	1.28
creativity (incl. client r/ts, thinking on feet)	1.33
innovation (incl. ability to adapt quickly to change + take risks + grow your job)	1.39
strategic planning	1.47
negotiating skills	1.47
IT literate (incl. comm)	1.59
across industry/cross sector K	1.62
leadership & leadability	1.62
presentation skills	1.67
contracts	1.85
managerial skills	1.85
technical skills (incl. music tech/perf; outsourcing; rigging/tech spec; Qbase; basic music training; performance)	1.88
sampling issues	1.91
Web & new media skills (construction/web development out-sourced)	1.91
A & R / promotions	1.94
secretarial / admin	1.94
databases	1.97
copyright (awareness/appreciation/outsourcing)	2.00
research skills	2.13
accountancy & finance (incl. own tax, selfemployment + budgeting + K of source)	2.18
Editorial training	2.24
foreign languages	2.53
Print production & design (awareness of / eye for)	2.59

Appendix 2 Fig 2.4, Fig 2.5 & Fig 2.6 (Prompted) Key Skills Desired on Entry Rated by Importance

SUB SECTOR A

ALL SKILLS	
empathy of what others are trying to achieve	1.00
Patience	1.00
attitude	1.10
teamworking skills	1.10
communication skills	1.15
IT literate (incl. commn)	1.30
lateral thinking (incl. problem solving)	1.35
presentation skills	1.35
networking	1.40
negotiating skills	1.45
being an anorak!	1.50
copyright (awareness/appreciation/outsourcing)	1.50
creativity (incl. client r/ts, thinking on feet)	1.50
innovation (incl. ability to adapt quickly to change + take risks + grow your job)	1.50
leadership & leadability	1.60
strategic planning	1.65
across industry/cross sector K	1.67
time management	1.70
contracts	1.80
secretarial / admin	1.80
Web & new media skills (construction/web development out-sourced)	1.80
knowledge of music	2.00
research skills	2.00
sampling issues	2.00
technical skills (incl. music tech/perf; outsourcing; rigging/tech spec; Qbase; basic music training; performance)	2.00
accountancy & finance (incl. own tax, selfemployment + budgeting + K of source)	2.05
A& R / promotions	2.11
databases	2.20
managerial skills	2.20
print production & design (awareness of/eye for)	2.30
editorial training	2.50
foreign languages	2.50

SUB SECTOR B

ALL SKILLS	
across industry/cross sector K	1.00
attitude	1.00
communication skills	1.00
IT literate (incl. commn)	1.00
managerial skills	1.00
negotiating skills	1.00
teamworking skills	1.00
Web & new media skills (construction/web development out-sourced)	1.00
accountancy & finance (incl. own tax, selfemployment + budgeting + K of source)	2.00
creativity (incl. client r/ts, thinking on feet)	2.00
databases	2.00
foreign languages	2.00
innovation (incl. ability to adapt quickly to change + take risks + grow your job)	2.00
lateral thinking (incl. problem solving)	2.00
presentation skills	2.00
print production & design (awareness of/eye for)	2.00
research skills	2.00
strategic planning	2.00
technical skills (incl. music tech/perf; outsourcing; rigging/tech spec; Qbase; basic music training; performance)	2.00
time management	2.00
A& R / promotions	3.00
contracts	3.00
copyright (awareness/appreciation/outsourcing)	3.00
editorial training	3.00
leadership & leadability	3.00
networking	3.00
sampling issues	3.00
secretarial / admin	3.00

SUB SECTOR C

ALL SKILLS	
communication skills	1.00
negotiating skills	1.00
networking	1.00
attitude	1.13
lateral thinking (incl. problem solving)	1.13
managerial skills	1.13
strategic planning	1.13
teamworking skills	1.13
time management	1.13
leadership & leadability	1.19
creativity (incl. client r/ts, thinking on feet)	1.31
IT literate (incl. commn)	1.31
contracts	1.38
presentation skills	1.38
across industry/cross sector K	1.50
innovation (incl. ability to adapt quickly to change + take risks + grow your job)	1.50
accountancy & finance (incl. own tax, selfemployment + budgeting + K of source)	1.75
secretarial / admin	1.75
Web & new media skills (construction/web development out-sourced)	1.88
copyright (awareness/appreciation/outsourcing)	1.94
A& R / promotions	2.00
sampling issues	2.06
technical skills (incl. music tech/perf; outsourcing; rigging/tech spec; Qbase; basic music training; performance)	2.06
print production & design (awareness of/eye for)	2.25
research skills	2.29
foreign languages	2.38
databases	2.50
editorial training	2.56

Fig 2.7 , Fig 2.8, Fig 2.9 & Fig 2.10 (Prompted) Key Skills Desired on Entry Rated by Importance

SUB SECTOR D		SUB SECTOR E		SUB SECTOR F		SUB SECTOR G	
ALL SKILLS		ALL SKILLS		ALL SKILLS		ALL SKILLS	
attitude	1.00	individuality	1.00	attitude	1.00	attitude	1.00
communication skills	1.00	communication skills	1.06	individuality	1.00	communication skills	1.00
teamworking skills	1.00	networking	1.09	networking	1.07	knowledge of sector context	1.00
time management	1.00	attitude	1.12	communication skills	1.14	passion	1.00
technical skills (incl. music tech/perf; outsourcing; rigging/tech spec; Qbase; basic music training; performance)	1.08	lateral thinking (incl. problem solving)	1.12	lateral thinking (incl. problem solving)	1.14	teamworking skills	1.09
creativity (incl. client r/ts, thinking on feet)	1.20	teamworking skills	1.12	teamworking skills	1.14	creativity (incl. client r/ts, thinking on feet)	1.14
presentation skills	1.20	innovation (incl. ability to adapt quickly to change + take risks + grow your job)	1.24	innovation (incl. ability to adapt quickly to change + take risks + grow your job)	1.29	technical skills (incl. music tech/perf; outsourcing; rigging/tech spec; Qbase; basic music training; performance)	1.25
copyright (awareness/appreciation/outsourcing)	1.40	creativity (incl. client r/ts, thinking on feet)	1.29	contracts	1.33	time management	1.28
innovation (incl. ability to adapt quickly to change + take risks + grow your job)	1.40	time management	1.31	IT literate (incl. commn)	1.33	innovation (incl. ability to adapt quickly to change + take risks + grow your job)	1.30
contracts	1.50	IT literate (incl. commn)	1.44	leadership & leadability	1.33	lateral thinking (incl. problem solving)	1.41
IT literate (incl. commn)	1.60	negotiating skills	1.44	managerial skills	1.33	IT literate (incl. commn)	1.45
lateral thinking (incl. problem solving)	1.60	strategic planning	1.50	negotiating skills	1.36	presentation skills	1.45
managerial skills	1.60	leadership & leadability	1.53	across industry/cross sector K	1.42	negotiating skills	1.55
negotiating skills	1.60	managerial skills	1.56	creativity (incl. client r/ts, thinking on feet)	1.43	contracts	1.56
networking	1.60	technical skills (incl. music tech/perf; outsourcing; rigging/tech spec; Qbase; basic music training; performance)	1.56	copyright (awareness/appreciation/outsourcing)	1.50	networking	1.59
accountancy & finance (incl. own tax, self employment + budgeting + K of source)	1.80	across industry/cross sector K	1.59	technical skills (incl. music tech/perf; outsourcing; rigging/tech spec; Qbase; basic music training; performance)	1.50	across industry/cross sector K	1.65
leadership & leadability	1.80	presentation skills	1.65	outsourcing; rigging/tech spec; Qbase; basic music training; performance)	1.57	leadership & leadability	1.73
secretarial / admin	1.80	contracts	1.75	presentation skills	1.57	copyright (awareness/appreciation/outsourcing)	1.78
strategic planning	1.80	Web & new media skills (construction/web development out-sourced)	1.81	strategic planning	1.67	Web & new media skills (construction/web development out-sourced)	1.80
across industry/cross sector K	1.90	sampling issues	1.84	time management	1.67	secretarial / admin	1.90
Web & new media skills (construction/web development out-sourced)	1.90	research skills	1.87	Web & new media skills (construction/web development out-sourced)	1.67	sampling issues	1.94
databases	2.10	copyright	1.88	secretarial / admin	1.75	A& R / promotions	1.95
editorial training	2.10	(awareness/appreciation/outsourcing)	1.88	research skills	1.83	accountancy & finance (incl. own tax, self employment + budgeting + K of source)	1.95
sampling issues	2.10	secretarial / admin	1.91	sampling issues	1.92	employment + budgeting + K of source)	1.95
A& R / promotions	2.20	databases	2.03	accountancy & finance (incl. own tax, self employment + budgeting + K of source)	2.08	managerial skills	1.95
foreign languages	2.20	A& R / promotions	2.06	A& R / promotions	2.17	strategic planning	2.00
print production & design (awareness of/eye for)	2.60	accountancy & finance (incl. own tax, self employment + budgeting + K of source)	2.28	databases	2.25	research skills	2.40
research skills	2.70	editorial training	2.43	foreign languages	2.42	foreign languages	2.45
		foreign languages	2.47	print production & design (awareness of/eye for)	2.50	databases	2.50
		print production & design (awareness of/eye for)	2.72	editorial training	2.90	editorial training	2.61
						print production & design (awareness of/eye for)	2.65

Fig 3.1

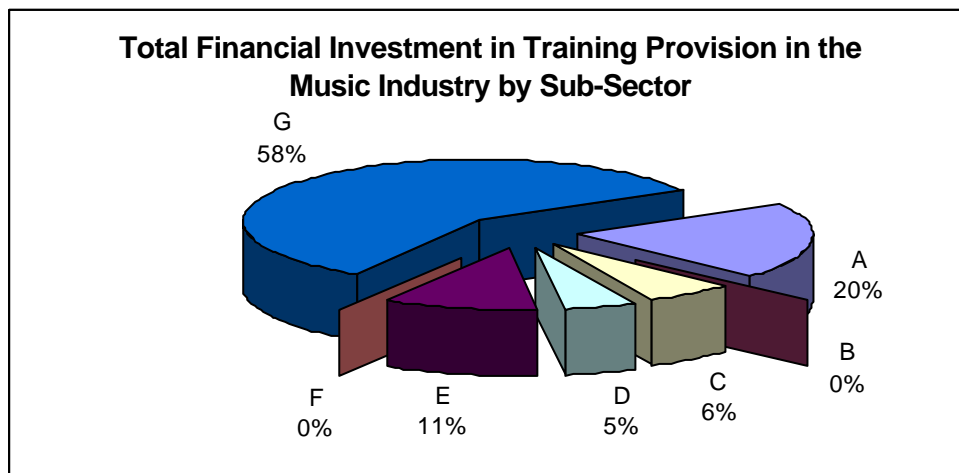
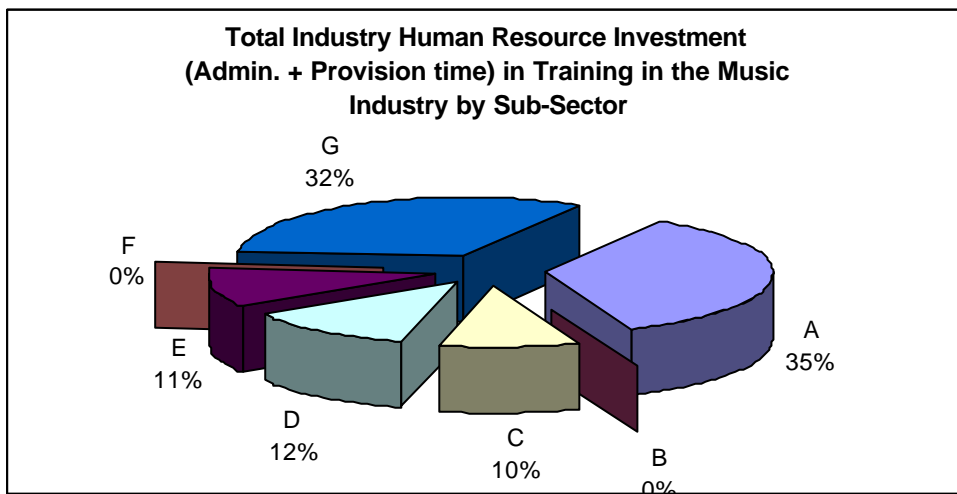
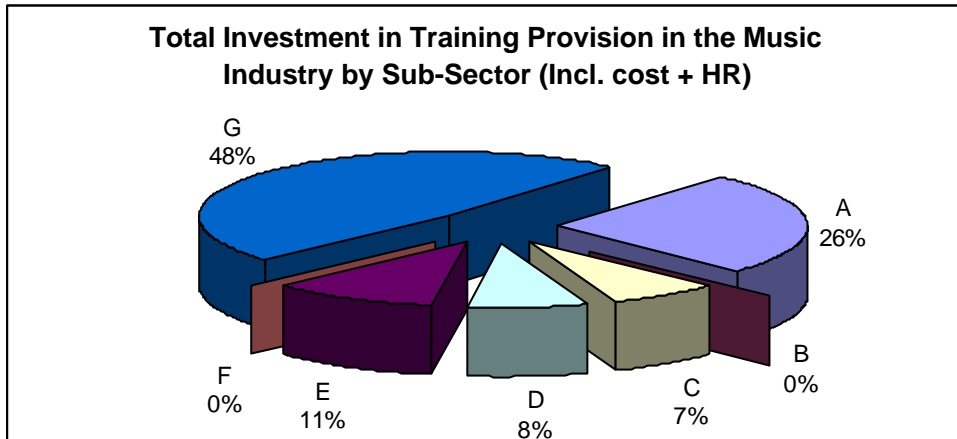
Key skills & Future challenges ...

Below is a list of the key obstacles / challenges facing each sub-sector in relation to education and training :

- **Sub-sector A** - New technologies / Lack of cross-sector initiatives / Funding issues / Over-subscription / Low salaries / Lack of professional standards & relevant training and sector-specific knowledge / Lack of transferable skills
- **Sub-sector B** - Unrealistic employment expectations / Low salaries / Image of the music industry
- **Sub-sector C** - New technologies / Corporate take-overs / Mergers & acquisitions / Piracy & new revenue streams / Over-subscription / Lack of (sector specific) relevant training & lack of progression routes / Low salaries / Lack of awareness of funding sources
- **Sub-sector D** - New technologies / Over-subscription / Freelance skills / Lack of transferable skills
- **Sub-sector E** - New technologies & technological change / Inter-sector competition / Erosion of resources / Need for new business models / Entrepreneurial skills & change management strategies / Over-subscription / Gaps between educational & training and 'real life'
- **Sub-sector F** - New technologies / Over-subscription / New business models
- **Sub-sector G** - Lack of accreditation & evaluation / Quality assurance / Cross-sector learning & understanding

Fig 3.2

Charts showing current provision / investment in training provision (by sub-sector).



Appendix 4

Fig 4.1 : Degree courses

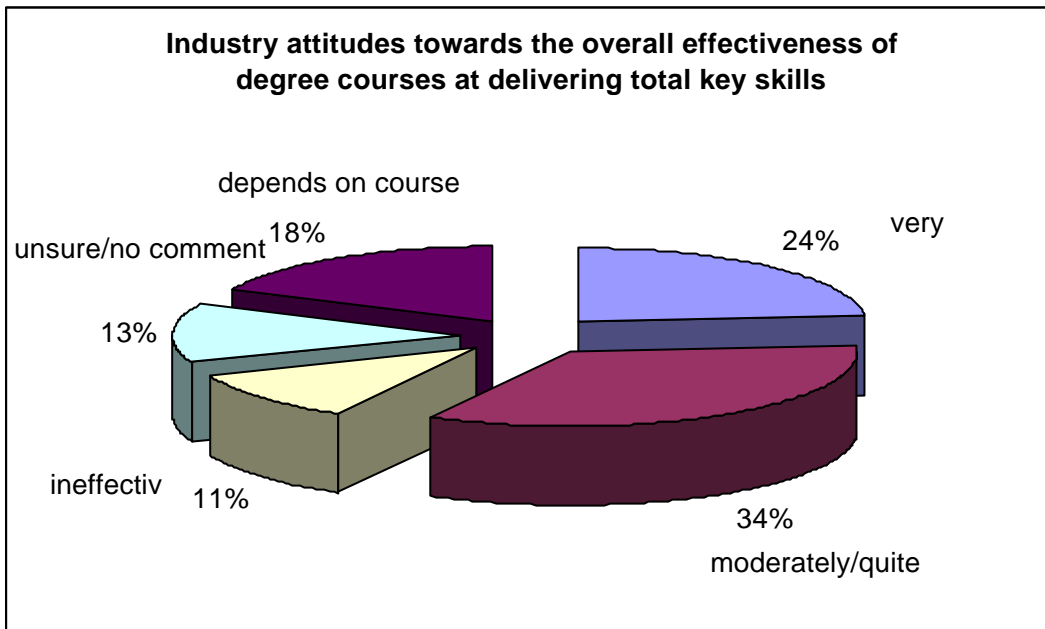
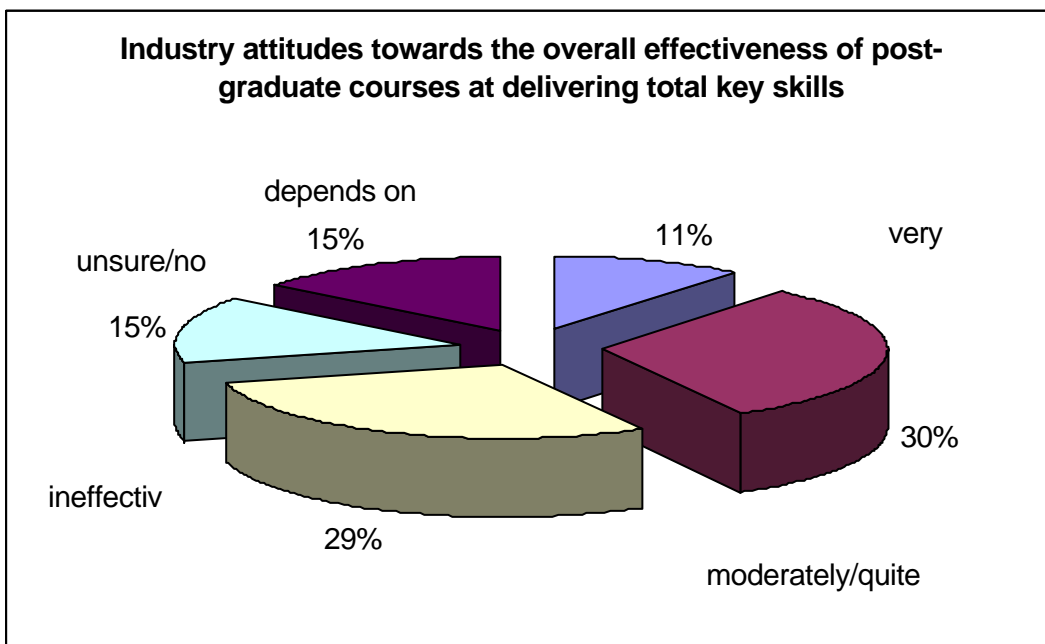


Fig 4.2 : Post-graduate courses



Appendix 4

Fig 4.3 : HNC / HND courses

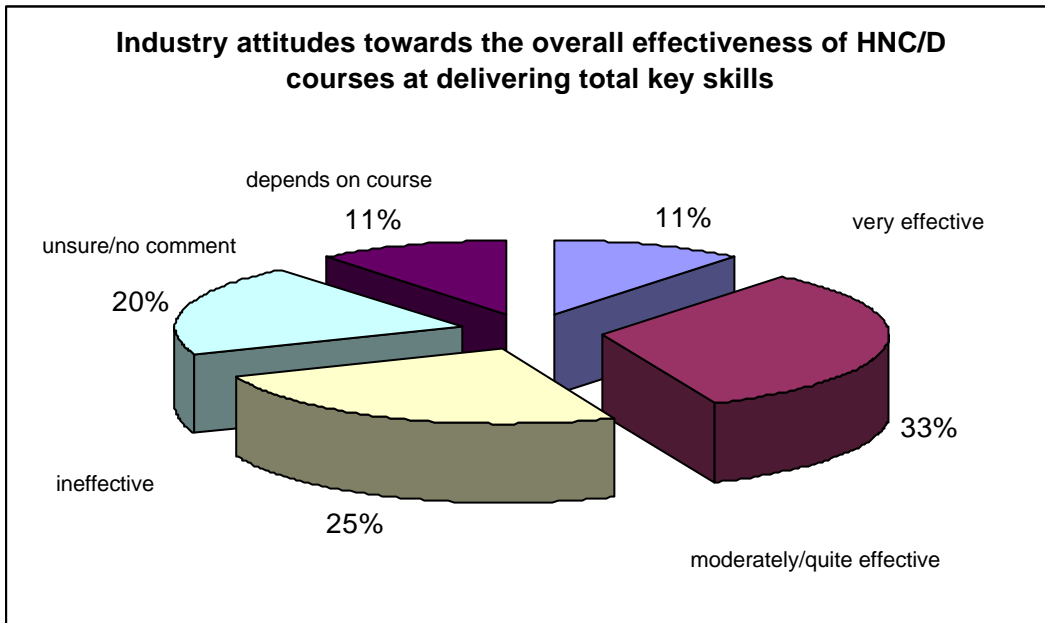
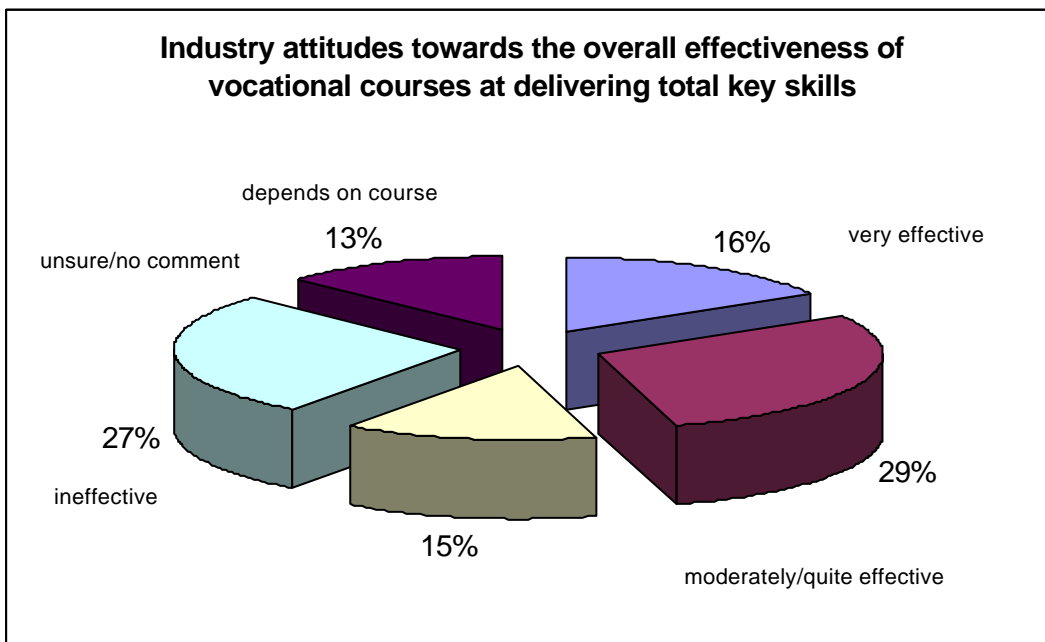


Fig 4.4 : Vocational courses



**Fig 5.1: Overall Industry Support for Possible SSC Involvement
In Future Training Initiatives**

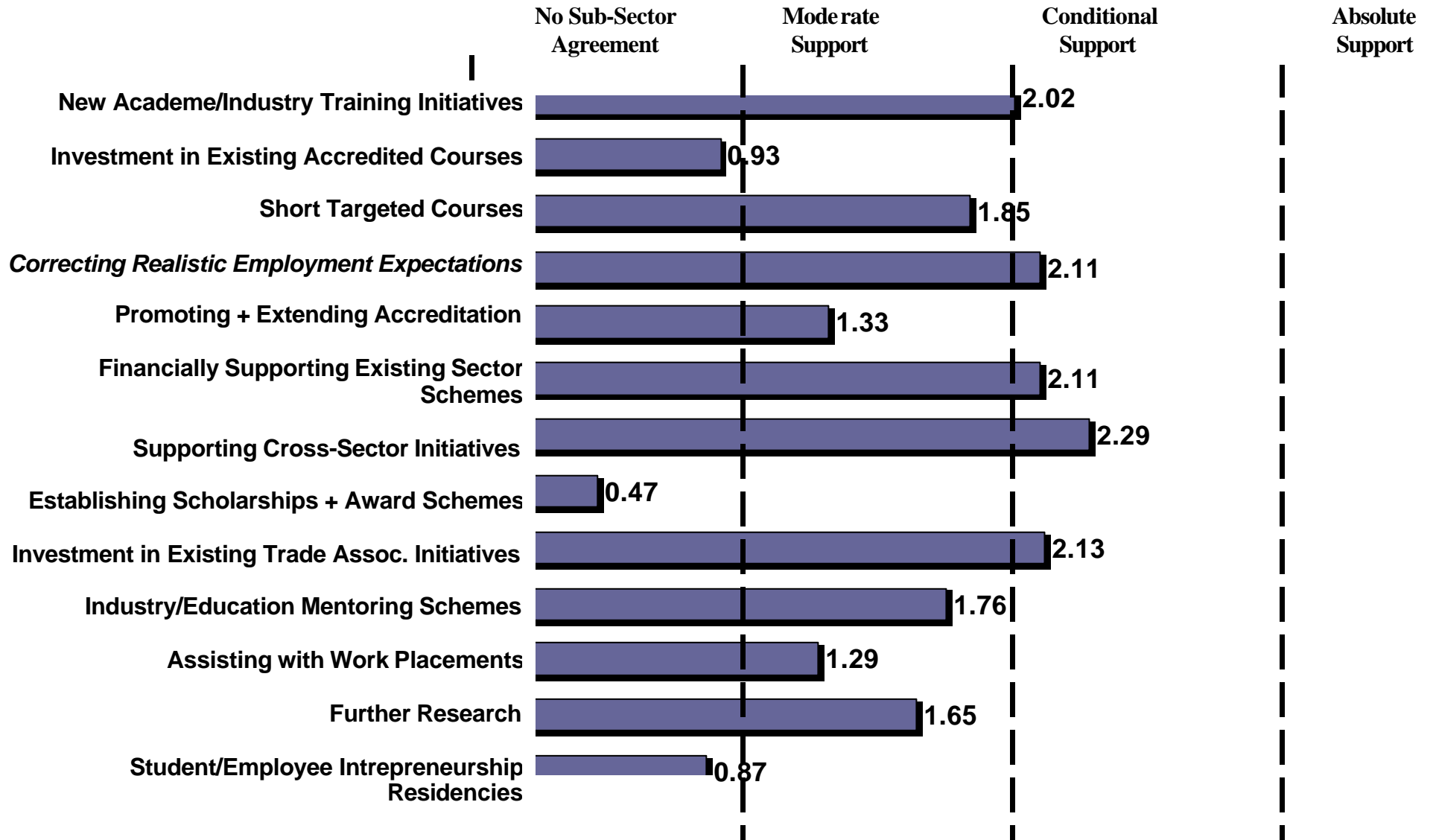
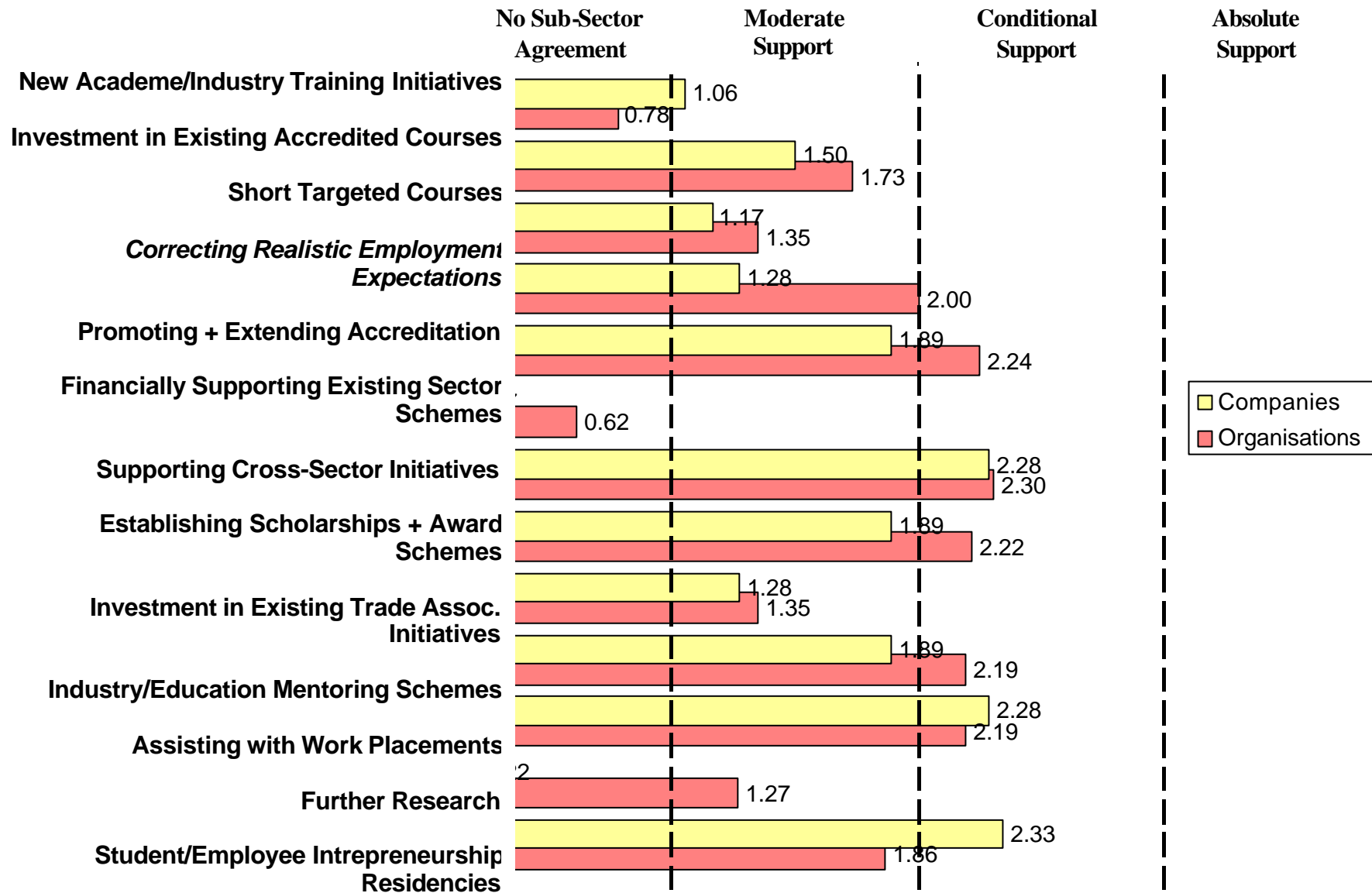


Fig 5.2 : Total Companies' + Organisations' Support for Possible SSC Involvement In Future Training Initiatives



Appendix 6

EVENTS	A	B	C	D	E	F	G	TOTAL
Short Skills -Based Events		£ -		£ -		£ -	£ -	£ 399,279.05
In-House	£ -	£ -	£ -	£ -	£ 143,800.71	£ -	£ -	£ 143,800.71
Member/Open	£ 81,668.61	£ -	£ 12,506.40	£ 1,987.98	£ 37,103.95	£ -	£ -	£ 133,266.94
Learning + teaching events	£ -	£ -	£ 35,442.15	£ 80,516.05	£ 6,253.20	£ -	£ -	£ 122,211.40
Small-Scale Learning Events	£ 43,527.93	£ -	£ 33,439.26	£ -	£ 2,521.74	£ -	£ 58,877.24	£ 138,366.17
Large-Scale Info. Sharing	£ 24,473.04	£ -	£ 106,675.20	£ 35,378.85	£ 35,297.43	£ -	£ 100,795.40	£ 302,619.92
Informal Networking Events	£ 2,646.63	£ -		£ -	£ 5,250.64	£ -	£ -	£ 7,897.27
Special Events	£ -	£ -	£ 68,444.38	£ 6,513.75	£ 7,295.40	£ -	£ -	£ 82,253.53
TOTAL	£ 152,316.21	£ -	£ 256,507.39	£ 124,396.63	£ 237,523.07	£ -	£ 159,672.64	£ 930,415.94
CPD PROGRAMMES								
Development Work	£ 41,631.41	£ -	£ 70,296.39	£ 154,931.86	£ -	£ -	£ 997,872.98	£ 1,264,732.64
Continuing Education	£ 30,527.50	£ -	£ -	£ 16,703.65	£ 48,266.87	£ -	£ 679,930.96	£ 775,428.98
Curricula -based Primary/Secondary	£ 898,194.00	£ -	£ -	£ 26,055.00	£ -	£ -	£ 350,000.00	£ 1,274,249.00
Curricula -based Tertiary	£ -	£ -	£ -	£ -	£ 197,343.40	£ -	£ 1,875.96	£ 199,219.36
Online Training	£ -	£ -	£ -	£ -	£ -	£ -	£ -	£ -
TOTAL	£ 970,352.91	£ -	£ 70,296.39	£ 197,690.51	£ 245,610.27	£ -	£ 2,029,679.90	£ 3,513,629.97
RESEARCH/PUBLICATIONS								
Research	£ -	£ -	£ -	£ -	£ -	£ -	£ 132,258.98	£ 132,258.98
Learning/support. Materials	£ -	£ -	£ 7,295.40	£ 18,114.27	£ 37,086.96	£ -	£ 12,377.24	£ 74,873.87
Info, Sources	£ -	£ -	£ 27,555.00	£ 38,114.27	£ 3,605.50	£ -	£ 35,203.98	£ 104,478.75
Archives/Libraries	£ -	£ -	£ -	£ -	£ -	£ -	£ 937.98	£ 937.98
TOTAL	£ -	£ -	£ 34,850.40	£ 56,228.54	£ 40,692.46	£ -	£ 180,778.18	£ 312,549.58
SPONSORSHIPS								
Various	£ 150,000.00	£ -	£ -	£ -	£ -	£ -	£ -	£ 150,000.00
Publications	£ 6,250.00	£ -	£ -	£ -	£ -	£ -	£ -	£ 6,250.00
Events	£ 6,250.00	£ -	£ -	£ 2,712.19	£ -	£ -	£ -	£ 8,962.19
TOTAL	£ 162,500.00	£ -	£ -	£ 2,712.19	£ -	£ -	£ -	£ 165,212.19
TOTAL	£ 1,285,169.12	£ -	£ 361,654.18	£ 381,027.86	£ 523,825.80	£ -	£ 2,370,130.72	£ 4,921,807.68

Fig 6.1 Sub-Sector Investment in Current & Planned Training Initiatives (by Type of Initiative)

SHORT SKILLS-BASED EVENTS**In-House**

Absence Management
 Accelerated Management Devt. Programme
 AS400 Database training
 cross-sector training
 Customer Service Training
 In-house Training - general
 IT Itraining

Member/Open

artist management Training
 business affairs workshop
 copyright enforcement training course
 Data Software Induction
 essentials audio post-prod. Induction
 festival training courses
 governance induction
 IP/copyright/publishing induction
 Library + Info. Training
 management training
 media workshop
 music industry course
 music recording studios induction
 music tech. inductions
 Music technology Workshops
 New Techn. Special Education Talks
 orchestral management
 technical workshops

learning + teaching events

Adjudicator induction workshops
 Mentor Training
 Music teaching in professional practice course
 professional adjudicators course
 professional conductors course
 various local centre events

EVENTS**SMALL-SCALE LEARNING EVENTS**

artist management seminars
 Community Music Area Gatherings
 education focused seminars
 Education Management Programme
 festival related seminars
 finance/royalties seminars
 fundraising/marketing/audience development
 IP surgeries
 Joint Seminar/Public Symposia
 library/archiving study weekends
 marketing/events seminars
 New Deal Seminars
 orchestral management seminars
 pipeline surgeries
 producer management seminars
 singer/songwriter workshops/training
 Sound Sense Development Area Gathering
 special focus seminars
 specialist managers seminar
 Teacher Training days
 tx, legal, finance seminars

LARGE SCALE INFO. SHARING

Annual Conferences
 Association Days
 MPG Roadshow 2001
 regional conference
 Roadshows
 Sound Advice
 Sound Sense Roadshows
 informal networking events
 MPG Live
SPECIAL EVENTS
 European Youth Summer Music Course
 National Orchestra Week
 Summer School
 Trade Show/Industry network event

Fig 6.2 Taxonomy of Initiatives: Events

Appendix 6

CPD PROGRAMMES
Development Work
Workforce Devt. Plan
Education + Training Advisory/steering Groups/Panels/Committees
Education/Training/Project/ Development Officers
Training Gateways Pilot
Women in Music EQUAL Programme
Professional Festival Adjudication Programme
Professional Animateur Development Project
Consultancy
Continuing Education
Teacher/Player Professional Partnerships Programme
Volunteer Placement Scheme
Technical training support programme
Informal/structured CPD programme
Management Development Programme
Appraisal/Personal Development Scheme/Plans
MBA employee sponsorships
Theatre Technician BTEC employee sponsorship
Future Proof Teacher development
Modern Apprenticeship Scheme
Graduate Apprenticeship Scheme
Apprenticeship scheme
Informal Mentoring scheme
Orchestral management training programme
AIM structured Mentoring Scheme
Special Education Teacher Skills Development Programme
Curricula-based Primary/Secondary
Sound Inventors creating music Programme
Respect value of music campaign
Orchestras in education
A Song for Youth
Curricula-based Tertiary
London College Printing module collaboration
Student Membership Scheme
Work Placements/Internships
Accreditation schemes
YCN Animateur Course
Advanced CM Diploma design/accreditation
Jazz Module Design/accreditation
Arts Management design/accreditation
Foundation degrees
Accredited Tech/Business Training Access Courses
Open College Network Contemp. Music Practice Courses
Community Music design/accreditation
HE Panel Visits/Lectures
Online Training
Online Skills Dialogue project
NetGain Learning
MAESTRO online mentor support
ActiveSkills

Fig 6.2 Taxonomy of Initiatives: CPD Development Programmes

Appendix 6

RESEARCH/PUBLICATIONS
Research Projects
A Common Approach 2002
Academic Research
Accredited Course Mapping Exercise
Jazz Industry Mapping Exercise
Artist Management Mapping Exercise
Technical-based training mapping exercise
Festivals Mean Business Survey
Research - various
Condensed Field-work Studies
EqualOpps Research Projects
Journal
Classical Music Artists
learning/support. materials
Info. Publications - various
Festival packs
Career Guides
Cool Keys
Guide to Lobbying
GNVQ Support Materials
digital Arts Sector support materials
Teaching support materials
musicindie.com
ArtsExplorer.com
Info, Sources
Graduate database
Member directories
Training Info. + Advice Line/Website
Print-based Education/Training Guides/Directories/Guidance
Online Education/Training Guides/Directories
Archives/Libraries
Information Bank

SPONSORSHIPS
various
Sponsorship
Sponsorship ABO Orchestras in Education
publications
Sponsorship Jazz Services training manuals
sponsorship music ed directory
events
sponsorship Leeds Jazz Conferences
sound advice sponsorship

Fig 6.3 Taxonomy of Initiatives: Research & Sponsorships

Fig 7.1

List of references & sources

ATSF / BIMA (2002), "iProfessionals: Education, training and development audit"

DCMS (2001), "Mapping Document of Creative Industries"
(2002), "Banking On A Hit"
(2002), "Consumers Call The Tune"

DfES (2001), "Meeting the Sector Skills and Productivity Challenge"
(2002a), "Delivering Results: A Strategy to 2006"
(2002b), "14-19: Extending opportunities and raising standards"

LSDA (2002), "Success for All: Reforming further education and training"

SSDA (2002a), "In-fluence", Skills for Business
(2002b), "In-vestigate", Skills for Business

www.ssda.org.uk
www.open.gov.uk
www.dcms.gov.uk

Fig 7.2

Trade Organisations and companies consulted

1. ssA ABRSM Publishing Ltd, British Academy of Composers and Songwriters, British Music Rights, Fairwood Music, MCPS-PRS Alliance, Music Publishers Association, Oxford University Press, PRS Foundation, Warner-Chappell
2. ssB Music Industries Association
3. ssC Agents Association, British Arts Festivals Association, British and International Federation of Festivals, Concert Promoters Association, First Column, International Artist Managers' Association, Music Managers Forum
4. ssD Association of British Orchestras, Incorporated Society of Musicians, Jazz Services, Making Music, Musicians' Union, PLASA
5. ssE AIM, Association of Professional Recording Services, British Phonographic Industry, International Association of Music Librarians (UK), Music Producers Guild (Freelance professionals), Phonographic Performance Ltd, Sony UK, Sound to Picture, Universal
6. ssF British Association of Record Dealers
7. ssG Barclay Executive, Career Moves, CM (Formerly Community

Music, Federation of British Conservatoires, Federation of Music Services, Music Education Council, Metier, National Foundation for Youth Music, Sound Sense, Trinity College London, YoungChoirs.Net

Fig 7.3

List of Interviewees

Sub-Sector A

<i>Organisations</i>		<i>Companies</i>	
Stuart Jeffers	MCPS-PRS Alliance	Leslie East	ABRSM Publishing Ltd
Francis Lowe	British Music Rights	Peter Cornish	Fairwood Music
Jennifer Goodwin	Music Publishers Association	Jane Dyball	Warner/Chappell
David Francis	PRS	Andrew Potter	Music Publishers Association
Chris Green	British Academy of Composers & Songwriters		/ Oxford University Press

Sub-Sector B

<i>Organisations</i>		<i>Companies</i>
David Fox	Music Industries Association	None

Sub-Sector C

<i>Organisations</i>		<i>Companies</i>	
Gwyn Rhydderch	British Arts Festivals Association	Phil Nelson	First Column
Liz Whitehead	British & International Federation of Festivals		
Carole Smith	Concert Promoters Association		
Atholl Swainston-Harrison	International Artist Managers' Association		
Stuart Worthington	Music Managers Forum		
Keith Harris	Music Managers Forum		
Benny Gallagher	PAMRA		
Tony Sherwood	Agents Association		

Sub-Sector D

<i>Organisations</i>		<i>Companies</i>
Fiona Penny	Association of British Orchestras (ABO)	None
Neil Hoyle	Incorporated Society of Musicians (ISM)	
Chris Hodgkins	Jazz Services	
Robin Osterley	Making Music	
Bob Wearn	Musicians' Union	
Matthew Griffith	PLASA	

Sub-Sector E

<i>Organisations</i>		<i>Companies</i>	
Remy Harris	Association of Independent Music (AIM)	Richard Todman	freelance
Alison Wenham	AIM	Steven Gurewitz	freelance
Doug D'Arcy	AIM	Andy East	Music Producers Guild (MPG)
David Ward	Association of Professional Recording Services	Phil Harding	MPG
Peter Filleul	APRS	Pip Williams	MPG
Andrew Yeates	British Phonographic Industry (BPI)	Tony Platt	MPG
Susi Woodhouse	International Association of Music Librarians	Harriet Cadman	Ministry of Sound (MOS)
Dominic McGonigal	Phonographic Performance Limited (PPL)	James Berkely	Sound to Picture
Carolann Spencer	Sony Music Entertainment Europe	Mairin Gannon	Universal Music

Sub-Sector F

Organisations
Bob Lewis

Companies
British Association of Record Dealers (BARD)None

Sub-Sector G

Organisations
George Caird
Richard Hickman

Federation of British Conservatoires
Federation of Music Services

Companies
Lionel Rose
Jessica Davis

Berkley Exec.
Career Moves

Roger Durston
Duncan Sones
John Stephens
Kathryn Deane
Mark Stringer
Malcolm Goldring
Alison Tickell

Music Education Council
Metier
National Foundation for Youth Music
Sound Sense
Trinity
YoungChoirs.Net
Community Music

Methodology

The overall methodology for this research exercise was devised to reflect 13 research objectives as agreed with the Steering Group. These objectives, in turn, were interpreted into three main areas in which the research exercise had to generate information to satisfy said objectives. The three key areas for research activities were thus determined as:

1. Identifying the current and future key skills in the music industry
2. Mapping any existing and planned training provision by the music industry
3. Establishing the potential future interface between the music industry and a new SSC

As a result, areas 1 and 3 were deemed to be addressed most effectively through the use of telephone interviews, while area 2 was addressed via a mapping exercise (details of the methodology used here can be found on page 199).

The original methodology for addressing research areas 1 and 3 consisted of the following proposal:

- To undertake 30 telephone interviews of between 30-60 minutes with industry organisations. In order to represent the music industry within an existing parameter, it was decided that all member organisations of the client (National Music Council) should be interviewed in this part of the methodology. The client provided the list of interviewees.
- To undertake 30 telephone interviews of between 30-60 minutes with employers. Again, the client provided a list of interviewees from its members, including freelancers.
- To undertake 5 interviews with Recruitment Agencies.
- To obtain 30 returned quantitative questionnaires filled in by employees and freelancers suggested by the employers interviewed.

The final number of interviews undertaken was 55. The final number of Recruitment Agencies interviewed was 2, and these were integrated in the qualitative analysis of the research document (refer to page 189).⁵ The final number of questionnaires returned was 15. These have not been included in the research report, as this number cannot be deemed to be of statistical value.⁶

There were two versions of questionnaires, one for industry organisations and employers, and one for Recruitment Agencies (see Appendix 1.1).

The questionnaires were designed with the aim of a) generating information in all 3 research areas, and b) supplying the research team with both qualitative and quantitative material for the final analysis of findings.

This methodological approach is reflected in the questionnaires in particular through the repeated use of unprompted and prompted questions regarding a given research area. For example, interviewees were initially asked - unprompted - what they regarded to be key skills in their sub-sectors, or in the industry as a whole (Qu.1A1). This was then followed up by a list of prompted key skills which interviewees were asked to rate by importance (Qu.1A2). This process was repeated for perception of accredited qualifications (Qu.1A3/1A4) and potential future SSC activities (Qu.3C/D). In contrast, questions regarding barriers to recruitment, future challenges, and main labour market issues were devised to generate qualitative answers only, as these particular questions served the purposes of 'filling in the picture' and providing contextualisations for the main research areas' outcomes.

The process of analysing the results from the interviews was two-fold: Quantitative analysis was undertaken from prompted and rated questions in the form of tables, diagrams, and graphs. These, in turn, were integrated, whenever relevant, into the qualitative analyses document covering all 7 sub-sectors.

The qualitative analysis document consists of summaries, in each sub-sector, of interview groups (where applicable). For example, sub-sector E (The Recording sub-sector) was analysed via three sub-groups of interviewees. In this case, each sub-group was analysed using the same template (details below).

Each qualitative sub-sector analysis starts with a list of key messages and an overall summary of the sub-sector's answers and results, followed by a more detailed summary of the interviews undertaken, including quotes from interviews and some tables.

The research team feel that this structure will allow users and readers of this report the choice between consulting (a) particular sub-sector(s) in more detail, whilst perhaps only reading the overall summaries of others. Some of the most striking similarities and discrepancies between sub-sectors in relation to particular questions or research areas have been cross-referenced in the text.

Research Methodology:

⁵ As a result of research undertaken at the beginning of the research exercise, 5 recruitment agencies working in the area of the music industry were identified as relevant to the research, and 2 of these agreed to interviews.

⁶ Attempts were made by the research team to obtain the agreed number of returned questionnaires throughout the research exercise. However, the envisaged mechanism, by which all employers interviewed agreed to distribute questionnaires to a minimum of five random employees and freelancers, did not lead to the desired outcome. The research team does extend its gratitude to all employer-interviewees who assisted it in this process.

As a result of these changes to the original research methodology, the research team wish to identify the following opportunity for future research: Employees' and freelancers' views should be sought on the outcomes of this research exercise, in order to identify whether this group of the music industry is by and large aware of key skills requirements and training opportunities.

Research took the form, in the first instance, of [recorded] telephone interviews, ranging from 30 minutes to one hour. The results from these interviews were then amalgamated for both qualitative and quantitative analysis.

Furthermore, due to the specific detail required for the mapping exercise (Qu. 5E) and the subsequent difficulty in garnering such data from interviewees' completed questionnaires, a second and third round of contact was undertaken focusing exclusively on the nature and cost of current and planned training provision in the music sector. This took the form of both secondary and primary research, followed by additional telephone interviews with those more particularly employed in / responsible for training and education within each company / trade organisation [See Mapping Document, pp195-202].

As such, the quantitative analyses of the research findings should be viewed in two distinct parts: the first where quantitative and (where possible) qualitative answers pertaining to the opinions of those working in the sector about current and planned training provision and the potential involvement of a new Sector Skills Council [SSC] at the interface of education and industry (re: Qus.1A1/2/4 and 3D/E) have been subjected to quantitative analysis; and the second representing the type and cost of training initiatives, current and planned, in the music industry today (Qus. 5A1-7/B1-3).

Sample:

55 people in total were interviewed – out of a possible 70 as provided by the steering group. While originally divided equally between representatives from companies and those from trade organisations, responses were disproportionately received from the latter.

In total, 37 members representing 34 trade organisations [orgs] were interviewed; and 18 members from the industry – representing 13 companies [cos]. These were then divided into seven sub-sectors for more appropriate comparative industry, sub-sector and trade-organisation/company analysis.

Questions (1.A.1/1.A.2)

Question 1A addresses key skills for the sector generally and asks interviewees to: first, list [unprompted] what they see as the key skills required on entry to their specific sub-sector; and secondly, rate the importance of a pre-defined list of key skills to those entering the sub-sector (according to the three-point scale, where 1 = extremely important, 2= important; 3= unimportant).

The data was then treated to the following analyses:

1.A.1 – Unprompted key skills

- All unprompted key skills listed by interviewee, and then ss (by cos, orgs + entire)
- These lists were then consolidated to indicate the number of mentions by each descriptive.
- Each skills was then valued according to the five-point scale 1-5 (where 1 = most mentions, and 5 = least number of mentions)
- All unprompted key skills also listed alphabetically by each descriptive.

Furthermore, unprompted skills were then categorised according to a suggested taxonomy addressing interviewees' valuation of varying skills' requirement upon entry to, progression in and movement between sub-sectors throughout employees' careers in the music industry. Each set of skills proffered at each level also, in some way, relates to the importance placed on each skill in the course of Qu. 1A2. The indicative categorisation tool therefore addresses cross-industry key, secondary and specific [sub-sector] skills needs at various career stages (entrance, vertical/horizontal integration) and works as a model transferable across the creative industries, [as illustrated in the suggested 'Model for the Future', found in the Executive Summary, p31]. This model should also be viewed as immediately comparable to the type of training provision called for in the course of this research, and indeed to those initiatives currently being designed and delivered across the music industry as part of Continued Professional Development programmes and ongoing in formal tertiary education. Skills are broken down as follows:

Core Competencies

- Basic
- Intermediate
- Advanced

First Aids

- Knowledge/interest
- Communication
- Qualities

Skills Sets

- Marcomms
- Finance
- Specific Skills
- Legal

1.A.2 – Prompted key skills (hard + soft)

- Ratings for each key skill (accorded 'hard' or 'soft' status at the questionnaire design stage) listed by interviewee, and then ss (by cos, orgs + entire) – where those answers sitting between two ratings (i.e. "2 to 3") were accorded medium value (i.e. 2.5).
- Representative values for each descriptive were then calculated for each skill by averaging total ratings per descriptive, $[\sum r/nss]$ (where r = rating, nss – number of interviewees p/ss).

- Skills were then listed by overall importance (from 1 [extremely important] through to 3 [unimportant]) for each descriptive; and then divided into hard and soft skills and listed by importance for each descriptive.

Question (1A4) – Effectiveness of existing accredited training provision

Qu. 1A4 addresses the effectiveness of existing accredited training provision at delivering the skills required upon entry to the sub-sector as identified in qus. 1A1/1A2. Interviewees were asked to rate the following courses according to a three-point scale [where 1 = extremely effective; 2= quite effective; 3= ineffective]: Degree courses; Postgraduate courses; HND / HNC / BTEC; Vocational training courses [identified as those courses working at the immediate intersection between training and industry, for instance CPD programmes and in-house training programmes targeted at employees]. Interviewee responses were then subject to the following analyses:

- All ratings and comments were listed p/person, and then grouped by descriptive.
- All qualitative answers were then attributed a class according to a five-point scale to account for those answers falling between two ratings (i.e. where “between 2 and 3” – or “moderately/quite effective” - is measured as 2.5), those respondents unable or declined to respond (‘unsure’ and ‘no comment’ respectively), and those wishing to reserve judgement (i.e. “depends on course”). [All answers therefore fall within one of the following five bands: very effective; adequately/quite effective; ineffective; unsure/no comment; and depends on the course].
- The number of responses in each class was then measured by descriptive.
- Data was then displayed as bar-charts comparing each ss [cos, orgs + entire] attitudes towards the effectiveness of each course; and as pie charts illustrating the level of each ss’ attitudes towards the effectiveness of each course individually.

Questions (3.D/3.E)

Questions 3D and 3E refers to future key skills and an SSCs potential involvement in training, and asks interviewees where they see an SSCs involvement in training best placed as a means to addressing possible future skills needs, and in which ways they believe their sub-sector would, if at all, be prepared to contribute to any such future initiatives.

3.D – Attitudes towards a new SSCs potential involvement in future training initiatives

- (Qualitative) interviewee responses towards 13 suggested future initiatives designed to address key skills needs in the industry were listed p/interviewee and attributed a value according to a seven-point scale designed to measure average degree of support for, and suggested level of SSC involvement in each initiative, by descriptive (No = -3; Probably Not = -2; Unsure = -1; No comment = 0; Possibly = 1; Yes, in theory/conditionally = 2; Yes = 2).
- The number of responses for each initiative per grouped descriptive, per value was then measured and an overall value for each initiative calculated per descriptive.
- This then allows for comparison of each descriptive’s total indicative support for an SSCs involvement in each initiative.
- For the sake of illustrative clarity, the 13 suggested initiatives have also been divided into four focus areas as detailed below:

Involvement in New Initiatives:

- Cross-sector
- Short Courses
- Academe/Industry
- Scholarships + Awards

Investment in Existing Initiatives

- Accredited Courses
- Existing Sector Schemes
- Trade Assoc. Initiatives

Research/Advice + Info. Provision

- Amending Job Expectations
- Further Research
- Promoting Accreditation

Involvement in Work-based Training

- Mentoring
- Work Placements
- Intrapreneurships

3E – Degree and Type of Industry Support for future SSC initiatives

- Each interviewee’s attitudes towards the likelihood, degree and type of support from their respective sub-sector for future SSC initiatives in terms of financial contribution; in an advisory capacity, collaboratively (across sub-sectors and the creative industries), and by seconding human resources was listed and attributed a value according to a seven-point scale relating to the probability of contribution (where No = -3; Unlikely = -2; Unsure = -1; No Comment = 0; Maybe = 1; Probably/Yes, conditionally = 2; yes = 3).
- The number of responses per class, per type of contribution by descriptive was then measured and an average value calculate per descriptive per type of contribution.
- This allows for comparative analyses of the likelihood of each ss contributing to future SSC initiatives and the type of that contribution