THE SOUND OF THE NEXT GENERATION

A COMPREHENSIVE REVIEW OF CHILDREN AND YOUNG PEOPLE’S RELATIONSHIP WITH MUSIC

By Youth Music and Ipsos MORI
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Music provides the soundtrack to our lives. It stirs powerful emotions and feelings, recalling vivid memories. It defines who we are, creates precious bonds and friendships, makes us feel better. Music does all these things and so much more.

And how we listen to, participate in and involve ourselves in music has changed. The digital revolution has democratised our participation in music. Music can be downloaded quickly at the touch of a button, if you fancy learning the guitar you can instantly click on an online tutorial. If you want to create some music, jump on a laptop, download some free software and away you go.

Yes, there’s upsides but downsides too. Instant access and democratisation can often mean we’re spending less time in the company of others. We’re missing out on being together, we can be left out and feelings of loneliness and isolation creep in. Whilst we might have online access to more music than ever before, we still can’t afford to go to that festival, be a regular gig goer, rehearse with a band or afford to buy that instrument we’ve always wanted. And if we’re at school, it’s getting increasingly more difficult to access music in the curriculum where its importance is in many cases being downgraded. The dominance of social media – combined with extended adolescence, constant attainment targets, exam pressures, fear of missing out and the political climate – creates uncertainty, which is having a significant impact on young people’s wellbeing.

Again and again, the evidence we gather at Youth Music demonstrates powerfully the personal and social benefits of music-making, how young people benefit from this and develop their own coping strategies, which they draw on particularly in difficult times. This year is Youth Music’s 20th Anniversary. The support of the National Lottery through Arts Council England was our foundation in 1999 and has been our bedrock ever since. This report is a call to action – it’s time to shake up the way music is perceived, funded and delivered, in order to make it more inclusive, equitable, and relevant to young people’s needs and interests. We’ve outlined a series of recommendations for national and local government, funders, schools, arts organisations and those working in the music industry – vital steps that will enable us to fully realise the transformative power of music in society.
Music is pretty much everything.” Chi

This research offers ground-breaking insights into the diverse ways young people engage with and value music and music-making, bringing to light the positive and meaningful impact music has for them.

Youth Music worked with Ipsos MORI to conduct online surveys with a representative sample of 1,000 young people aged 7 to 17 across England and create case studies of 14 participants involved in Youth Music projects. This was followed up with a series of in-depth expert interviews with industry leaders, psychologists and academics to understand the context of our findings and the wider impact of music on society. We found that:

Music is integral to young people’s lives. It’s young people’s favourite hobby, equal to gaming and ahead of sport, drama, and dance. Young people are listening to more music than ever before and they often listen while doing something else – music is the accompanying soundtrack to their lives. Young people have a diverse range of musical tastes, but genre definitions are becoming redundant as their choice of music is increasingly driven by their mood and state of mind.

Young people are making more music than they were a decade ago. The majority of young people are active music-makers and there are more young people making music than in a previous Youth Music survey conducted in 2006. Digital technology and policy changes have helped to democratise access. The types of activity and the instruments played vary with age and gender and there are increasing numbers of young people taking a DIY approach to music-making.

Music in secondary schools is in decline, posing risks for young people’s creativity and wellbeing and the future economy. Yet the need for young people to have a comprehensive and relevant music education is becoming more pressing than ever. The economy is changing, and occupations of the future will involve activities that machines are less able to do. Music and the creative arts help young people to develop specific skills and behaviours that will be increasingly important as artificial intelligence increases in future years. There’s an opportunity for music in schools to be re-imagined and re-imagined, so that it is more relevant and inclusive.

Patterns of engagement differ according to a young person’s background. Those from lower income backgrounds are more likely to see themselves as musical, and are just as likely as others to sing and play an instrument. They’re statistically more likely to be involved in musical activities that tie in with popular culture such as karaoke, making music on a computer and rapping. But their creative identities often go unrecognised in music education, and they’re less likely to get to more advanced levels of technical ability. This will have an impact on the diversity of the music industry in future years. If music education is to become more inclusive, then it needs to place more emphasis on valuing and nurturing young people’s existing creative identities.

Music is a powerful contributor to wellbeing. Exam pressures, a volatile external environment and technological and social change, in particular social media, are all linked to young people’s wellbeing. Listening to music makes most young people feel happy, and the effects of making music are even more powerful than listening to it. Young people are deploying music to articulate and communicate their thoughts and feelings. Music helps to form friendships which results in an increased sense of belonging. Those who regularly make music feel more in control of their future. Young people are using music as a tool to support their wellbeing. This could have greater impact if more parents, educational institutions and policy-makers did the same.

A diverse talent pool of young people supports the future of the music industry. The music industry is a vital and growing area of our economy, but a gap exists between music education and the industry. There are barriers to getting a job in the industry, particularly for those who live outside London and who have limited financial means. Those in the music industry are concerned about the talent pipeline and workforce diversity, yet there are plenty of young people from all kinds of backgrounds making music. Greater collaboration between music education and music industry offers a win-win situation.

A note on terminology

Throughout the report, we have used the term ‘young people’ to describe all those within the age range of our research, i.e. 7-25.
**The Sound of the Next Generation**

**The Voice of the Next Generation**

Music is young people’s favourite pastime, equal to gaming and ahead of sport, drama, dancing, and arts & craft.

97% of young people had listened to music in the last week.

69% of young people had watched a music video in the last week.

67% of young people make music.

25% of young people who play an instrument said that they are teaching themselves.

18-24 year olds stream up to an average of 487 videos a month on YouTube.

32% of 16-17 year olds stream up to an average of 487 videos a month on YouTube.

64% of young people think they are musical, up from 48% in 2006.

19% of 16-17 year old young men make music on a computer.

85% of young singers say singing makes them happy.

71% of 7-10 year old girls regularly sing.

23% of young instrument players have been taught by a friend or family member.

The average Spotify user streams 40 unique artists per week.

“I think I get a lot more work done if I have music in my ears.”
Charlotte

“I could express myself without having to talk to anyone about how I felt.”
Chi

“[Writing songs with my siblings] helped us to understand things about what happens with parents and stuff and helped us to understand how other people feel.”
Shelby

“If I didn’t have music ... I feel like I would be a grumpy little bastard!”
Kallum

“I enjoy it because I make lots of friends, it makes me work with them all the time, never leave them, play all the time music, never give up with them, always stay with them.”
Filip

“If I’m feeling something, I’ll write it. [Music’s] such a good way to get things out.”
Taz

“I was trying to improve my language so I decided to go in the school choir.”
Fabrice

“If I didn’t have music ... I feel like I would be a grumpy little bastard!”
Kallum

“If I’m feeling something, I’ll write it. [Music’s] such a good way to get things out.”
Taz

“I was trying to improve my language so I decided to go in the school choir.”
Fabrice

“It’s a good way to express yourself.”
Taz

“I like it because I can express myself.”
Kallum

“[Writing songs with my siblings] helped us to understand things about what happens with parents and stuff and helped us to understand how other people feel.”
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Taz

“I like it because I can express myself.”
Kallum
In England, music (alongside gaming) is young people’s favourite pastime. It plays a fundamental role in their lives. Two thirds of young people consider themselves to be ‘musical’, and in a given week, 90% listened to music. 97% of the young people surveyed had interacted with music in some way in the past week.

Consumption channels
The way young people interact with music has changed, with most young people listening to music on their own (75%), and by using a phone or tablet. 76% of those we spoke to said they mostly listened to music while doing something else, suggesting that it is not always an activity in and of itself, but is the soundtrack to their everyday lives.

The popularity of radio listening endures, with two-thirds (64%) of young people tuning in each week. A significant 69% of young people have watched a music video in the last week. YouTube is used by 80% of 16-24-year olds and users in this age range stream up to an average of 487 videos a month. Music was the most searched-for term on the site in 2017.

Live music
While there are large numbers of young people regularly listening to music, the same cannot be said for live music – only 11% reported having seen music played live in the last week.

Genres and artists
Ease of access has led to young people engaging with a diverse range of musical genres. While they overwhelmingly describe pop, rock and hip-hop/rap as their favourite genres of music, the range of young people’s tastes is vast. When asked to name their three favourite artists or groups, the most popular responses were inevitably major chart acts – Ed Sheeran, Little Mix and Stormzy – yet overall the 1,061 respondents named 633 different artists spanning more than 300 different genres.

Interests tracked trends from across the decades and included classical music, bebop, jazz, rock and roll, psychedelic rock, punk, new-wave, synth-pop, heavy metal, grunge, hip-hop, R&B, rave, hardcore, jungle, garage, dubstep, and grime. More contemporary styles covered everything from nightcore to k-pop, trap to Afrobeats, and tropical house and moombahtron.

“I don’t just do like one type of music, most people that come here will do multiple – they’ll do like grime, hip hop, R&B, garage…” – Kallum

The diverse and eclectic tapestry of young people’s musical tastes evident in our research is echoed by Spotify Insights data, which showed listening diversity increasing by more than 40% over a four-year period from 2014-17. Streaming services give young people more control over their listening habits, and Spotify now has more listeners than Radio 1.

Context is the new genre – the driver for young people’s musical consumption and preferences. Greater autonomy and choice is resulting in a move away from genre-based tastes, and instead moving towards a more all-embracing fusion of styles, with a focus on creating the right mood.

“[I]f you look at hip hop right now it is inspiring a whole new generation of jazz artists in the UK. A lot of young 18-24 year olds are going down to these jazz clubs in south London and these artists are combining all sorts of sounds. If you look at Kendrick Lamar, you can see the influences of jazz in his music.”

Rebecca Allen, President of Decca Records UK

We are starting to see the clear impact that the digital age is having on young people’s musical consumption and preferences. Greater autonomy and choice is resulting in a move away from genre-based tastes, and instead moving towards a more all-embracing fusion of styles, with a focus on creating the right mood.

“[W]e always got to listen to music. [...] It just, like, gets me in a good mood, like, waking up early in the morning, I straight away just put on music, straight away to like, just get me up in a good mood instead of just coming to school – like – sometimes I’ll just come to school angry for no reason, so it’s just good to listen to music.” Dwight

Seven of Spotify’s top ten most popular playlists in 2017 were context related, blurring genre boundaries, and three in particular are about creating a positive mood – ‘Monday Motivation’, ‘Feel Good Friday’ and ‘Get Home – Happy’.

This trend is reflected in new music being made and released.
2) YOUNG PEOPLE ARE MAKING MORE MUSIC THAN THEY WERE A DECADE AGO

The majority of young people in England are active music makers, and more young people are making music than previously. Two thirds of young people reported engaging in some form of music-making activity. The advent of new technologies, together with relatively healthy government and National Lottery investment, are the likely causes of such high participation rates.

As well as music in schools, the Department for Education’s National Plan for Music Education guides England’s strategy for music education. It ensures a £75 million annual investment in local Music Education Hubs, supporting young people to learn instruments and take part in ensembles. This funding is further supplemented by Arts Council England’s funding portfolio, which includes grants made in excess of £3 million annually by Youth Music, predominantly for out-of-school music-making activities, working with children from their early years into young adulthood. Published data gives a fairly good picture of who is and isn’t benefiting from this investment. But this is only one part of the story. In this research, we wanted to get a complete picture of young people’s musical lives, including what they do independently, or with friends and family outside more formal channels.

Musical engagement

The most commonly reported music-making activities were singing and playing an instrument. The next most popular activities are karaoke and making music on a computer. Levels of music-making have increased significantly since 2006, when a similar survey conducted by Youth Music found that just 39% of young people made in excess of £9 million annually by Youth Music, predominantly for out-of-school music-making activities, working with children from their early years into young adulthood. Published data gives a fairly good picture of who is and isn’t benefiting from this investment. But this is only one part of the story. In this research, we wanted to get a complete picture of young people’s musical lives, including what they do independently, or with friends and family outside more formal channels.

Thirty percent of young people say they play an instrument – higher than the previous study, when only 23% played. Two main factors are likely to have caused this increase: firstly, the growth in young people teaching themselves (for example using YouTube tutorials) and second, current government policy, which aims to ensure that all children of primary school age get the chance to play an instrument as part of group lessons called ‘whole class ensemble teaching’ (which most commonly happens in Year 4 [ages 8-9]).

We assessed how musical engagement and instrumental playing changes with age. Our research reinforces that of other studies which shows participation in music-making dropping significantly as children get older.

We found that:

- A third of all 7-10-year-olds say they play an instrument, but only one in four is still playing at the ages of 16-17 – there’s also a big gender gap with boys much more likely to stop playing.
- The significant decline in instrument-playing for boys as they get older is balanced with a corresponding increase in making music digitally.
- 16-17 year-old young men are twice as likely as young women of the same age to be making music on a computer.
- Singing has a similar drop-off rate with only one in four participating by the ages of 16-17.
- Ukulele, violin and recorder (instruments commonly used in whole class ensemble teaching) all see large drop-offs between the ages of 7 to 17, whereas the electric guitar increases most significantly in popularity over the same age period.
- The most commonly played instrument – for all ages – was the piano/keyboard, played by 44% of young musicians. Guitar (both acoustic and electric) comes a close second.
- Participation in after-school music clubs peaks among 11-15-year-olds, where 43% participate, but this nearly halves by sixth form age.
- Writing music was the only activity listed that had no obvious age or gender bias.

CHART 1: Please select all of the following which you do (all respondents)

<table>
<thead>
<tr>
<th>Activity</th>
<th>7-10 Year Olds</th>
<th>11-15 Year Olds</th>
<th>16-17 Year Olds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sing</td>
<td>44%</td>
<td>33%</td>
<td>22%</td>
</tr>
<tr>
<td>Play an instrument</td>
<td>33%</td>
<td>22%</td>
<td>11%</td>
</tr>
<tr>
<td>Karaoke</td>
<td>14%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Make music on computer or other device</td>
<td>13%</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>White music</td>
<td>8%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Rap or MC</td>
<td>6%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>DJ</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>KARAOKE</td>
<td>16%</td>
<td>22%</td>
<td>14%</td>
</tr>
<tr>
<td>WRITE MUSIC</td>
<td>9%</td>
<td>9%</td>
<td>8%</td>
</tr>
<tr>
<td>MAKE MUSIC ON COMPUTER OR OTHER DEVICE</td>
<td>7%</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>SOMETHING ELSE MUSICAL</td>
<td>2%</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>NET: ANY MUSICAL ACTIVITY</td>
<td>72%</td>
<td>85%</td>
<td>57%</td>
</tr>
<tr>
<td>I DON’T DO ANY OF THESE</td>
<td>28%</td>
<td>15%</td>
<td>43%</td>
</tr>
</tbody>
</table>

CHART 2: Please select all of the following that you have done in the past week, did any of: listened to music watched music videos, seen music played live, made music, had a music lesson (all respondents by age)

<table>
<thead>
<tr>
<th>Activity</th>
<th>7-10 Year Olds</th>
<th>11-15 Year Olds</th>
<th>16-17 Year Olds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Play an instrument</td>
<td>34%</td>
<td>28%</td>
<td>24%</td>
</tr>
<tr>
<td>Net: any musical activity</td>
<td>82%</td>
<td>80%</td>
<td>80%</td>
</tr>
</tbody>
</table>

A DECADE AGO

A third of all 7-10-year-olds say they play an instrument, but only one in four is still playing at the ages of 16-17 – there’s also a big gender gap with boys much more likely to stop playing.

The significant decline in instrument-playing for boys as they get older is balanced with a corresponding increase in making music digitally.

16-17 year-old young men are twice as likely as young women of the same age to be making music on a computer.

Singing has a similar drop-off rate with only one in four participating by the ages of 16-17.

Ukulele, violin and recorder (instruments commonly used in whole class ensemble teaching) all see large drop-offs between the ages of 7 to 17, whereas the electric guitar increases most significantly in popularity over the same age period.

The most commonly played instrument – for all ages – was the piano/keyboard, played by 44% of young musicians. Guitar (both acoustic and electric) comes a close second.

Participation in after-school music clubs peaks among 11-15-year-olds, where 43% participate, but this nearly halves by sixth form age.

Writing music was the only activity listed that had no obvious age or gender bias.
I wanted to do music in school, but it wasn’t this type of music [grime], so I never did music in school.” Kalum

However, a shrinking of school-based music opportunities is significant. Music teachers and music rooms are an essential part of school life – providing space and advice for young people to form their own bands, develop lasting friendships, take part in school musicals and after-school activities, and access instruments and rehearsal rooms to practice their craft.

“You make a lot more friends [from] it. Like, I did a musical. In Year 9, and I met a lot more people through it, and I interacted with people – it wasn’t just in my year, it was older and younger. Yeah, it made me feel – it was good.” Finlay

Music and the creative arts promote the development of specific skills, knowledge and behaviours that will be essential for the nation’s future economic success. The creative industries are a growth area of the economy: it’s estimated that by 2030 the UK could have generated as many as 1 million new creative jobs.5 Yet it is also predicted that as many as 800 million jobs worldwide could be displaced by automation over the same period of time.6 Occupations of the future will involve activities that machines are less able to do – things like managing people, applying expertise, and communicating persuasively. While the technical skills required for the world of work will vary depending on career, the ‘softer’ skills – teamwork, communication, leadership, emotional intelligence – will only grow in importance with the increasing uptake of artificial intelligence. It is imperative therefore that today’s generation of young people are given sufficient opportunities to develop their creative and soft skills and are prepared to enter the world of work.

Musical learning

Of those who play an instrument, 77% have had lessons. The largest proportion, just over half (55%), learn in school. Increasingly though, young people are taking a DIY approach with 39% reporting that they are to some extent teaching themselves. This is a significant increase since the 2006 study, when only 16% were guiding their own learning2.

Guitar players exhibit the most DIY approach to learning their instrument. Electric guitar, acoustic guitar, drums and other percussion players were the instruments most likely to be self-taught – almost half of these players reported teaching themselves. 31% of acoustic guitar players are taught by friends (compared to the next highest piano/keyboard at 25%) and almost one-quarter learn from YouTube or similar, compared to the average of 19% across all instruments.

Music in schools

While independently-led lessons and DIY music education are thriving, other areas of music learning are suffering a decline. GCSE and A Level Music exam entry rates are decreasing annually, and recent research points to a downward trend that has been occurring over many years. In fighting for music education in schools, the vital role that music plays in supporting young people’s wellbeing – and how musical engagement varies between people from different backgrounds – should be taken into account. It’s time to reflect on national musical education in the UK – to capitalise on young people’s love of music and their individual musical identities, to be inclusive and promote outcomes beyond attainment, to be more relevant to the creative industries, and to make music an indispensable part of school life.

CHART 3: What instrument(s) do you play? (all those who say they play an instrument)

<table>
<thead>
<tr>
<th>Instrument</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Piano/keyboard</td>
<td>14%</td>
</tr>
<tr>
<td>Acoustic Guitar</td>
<td>14%</td>
</tr>
<tr>
<td>Drums/Percussion</td>
<td>11%</td>
</tr>
<tr>
<td>Electric Guitar</td>
<td>11%</td>
</tr>
<tr>
<td>Recorder</td>
<td>10%</td>
</tr>
<tr>
<td>Violin</td>
<td>12%</td>
</tr>
<tr>
<td>Ukulele</td>
<td>11%</td>
</tr>
<tr>
<td>Flute</td>
<td>18%</td>
</tr>
<tr>
<td>Saxophone</td>
<td>12%</td>
</tr>
<tr>
<td>Clarinet</td>
<td>1%</td>
</tr>
<tr>
<td>Cello</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
</tbody>
</table>

CHART 4: How did you learn to play the (instrument)? (all those who say they play an instrument)

<table>
<thead>
<tr>
<th>Learning Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>NET Lessons inside school</td>
<td>8%</td>
</tr>
<tr>
<td>One to one lessons inside school</td>
<td>12%</td>
</tr>
<tr>
<td>Group lessons outside school</td>
<td>23%</td>
</tr>
<tr>
<td>I taught myself</td>
<td>29%</td>
</tr>
<tr>
<td>I learnt from a friend or family member</td>
<td>25%</td>
</tr>
<tr>
<td>I learnt from the internet (eg. YouTube)</td>
<td>20%</td>
</tr>
<tr>
<td>I learnt from a book</td>
<td>19%</td>
</tr>
<tr>
<td>NET Lessons outside of school</td>
<td>6%</td>
</tr>
<tr>
<td>Group lessons outside of school</td>
<td>4%</td>
</tr>
<tr>
<td>NET Self taught</td>
<td>10%</td>
</tr>
<tr>
<td>NET Any lessons</td>
<td>30%</td>
</tr>
<tr>
<td>NET Lessons at school</td>
<td>77%</td>
</tr>
<tr>
<td>NET Lessons outside of school</td>
<td>15%</td>
</tr>
</tbody>
</table>
3) PATTERNS OF ENGAGEMENT DIFFER ACCORDING TO A YOUNG PERSON’S BACKGROUND

Our research shows that those from lower income backgrounds have quite different patterns of engagement with music than those from higher income backgrounds. Many young people with limited financial means are experiencing a rich musical childhood – it just looks different to that of their more affluent peers. It's more likely to emanate from their home, have a DIY feel to it and less likely to be taught in a formal way. Often it's ‘everyday creativity’ – activity which is already happening in people's lives, an accessible form of culture that they can engage in.

Different kinds of engagement

We compared survey results for those who were entitled to free school meals to those who were not. 76% of those in receipt of free school meals describe themselves as musical, significantly higher than those who aren’t (60%). They're just as likely as other young people to sing and play an instrument, were significantly less likely to have seen music at a concert or gig (50% vs 27%), but twice as likely to have reported seeing live music played at home in the last week (45% vs 21%). They were also significantly more likely to be involved in certain types of musical activity – in particular karaoke, making music on a computer, writing music, DJing and rapping. The wider evidence base shows that from age 11 onwards, economic background becomes a major barrier to participation in certain forms of music education:

- Just 6% of regular participants in Music Education Hub ensembles and choirs are eligible for the ‘pupil premium’ (additional funding given to schools to support young people experiencing economic or family difficulties). A 2014 ABRSM report found that 74% of young people from the 20% wealthiest backgrounds had received instrumental lessons and were twice as likely to have taken a music exam as those in the lowest 25% income bracket.

This goes on to affect the make-up of the music industry later down the line:

The people who are able to access proper music education from an early enough age – so that they have the potential to go on to become professional musicians or composers – are increasingly being privately educated. Vick Bain, CEO of the British Academy of Songwriters, Composers and Authors (BASCA)

Popular culture and DIY music

Making music videos, producing beats and bars on a computer is reflective of the rise in the number of so-called ‘bedroom musicians’

The fact that almost one in five young males say they make music on a computer is reflective of the rise in the number of so-called 'bedroom musicians'.
4) MUSIC IS A POWERFUL CONTRIBUTOR TO YOUNG PEOPLE’S WELLBEING

The wellbeing of young people in the UK is increasingly under the spotlight and of growing concern. Over the last five years, 90% of school leaders reported an increase in the number of students experiencing anxiety or stress, and low mood and depression10 and an estimated three children in every 20 have a diagnosable mental health problem11. Anxiety, in particular, is on the rise among young people12, as their wellbeing is influenced significantly by curriculum changes, exam pressures13 and technological and social change. Social media use has been linked to lower subjective wellbeing in relation to family, appearance, school, work and life as a whole14.

Research shows that music has a positive impact on wellbeing15. It enables young people to connect with their peers, their community, their family and their roots. Making music as a group physically brings people together, encouraging teamwork, empathy and social bonding. It makes a positive contribution to young people’s subjective wellbeing – a positive state of mind where they feel good about their life, and its constituent parts (such as their relationships with others and how they see themselves). Subjective wellbeing can be assessed by measuring mental states including anxiety, happiness, life satisfaction, meaning, sadness, stress and worthwhileness.

Listening to music and positive emotional states

“Without music I’d probably be a lot more stressed out, I wouldn’t be a nice person to be around, cause it’s like the way I relieve stress and chill out, when music’s on you know you can just relax.” Hannah

The idea that music improves feelings of wellbeing was overwhelmingly supported in our findings, where a colossal 85% of young people told us music made them feel happy. Large numbers also said it made them feel cool (41%) and excited (39%), and when asked in our survey how they would feel if they had to go without music for even one day overwhelmingly they said they would be sad.

Well-aware of how music affects their emotions, young people are drawing on it as a tool to support their wellbeing. They’re DJs carefully curating the soundtracks to their lives. Just as a composer would write a musical score for a film, young people are using music to convey and reflect their feelings, to change their emotional state, and to regulate their mood16.

The choice of song and genre is an important mechanism in creating the right emotional state. While some young people told us they would turn to happy or upbeat music when they’re feeling down, others said it was important that the music matched their mood.

“For me, I do have to listen to sad music, it’s not just like I can play a happy song and I’ll just be happy cause it doesn’t work like that. I have to let me emotions go, so for me, sad music really helps me. It’s just like so invigorating, and it just lets all my emotions come out by themselves.” Kyle

Wider qualitative research has shown that young people choose different genres of music for different moods, but that they often like to be “mood-congruent”17 – that is, to listen to music that reflects how they’re feeling. This is because exploring the feelings and sensations created by music can help give “form to different feelings”18, making them more comprehensible.

Making music has greater impact than listening to it

Research suggests that the creative process of making music has a deeper and more profound impact than listening to it19. The young people we spoke to substantiated this, seeing music-making as a vital part of their lives and something which made them feel worthwhile:

“If I know I can play the piano, if I can play okay, and if I can play a song I feel like I’m useful. But if I don’t have music, if I wouldn’t be able to sing I’d just feel like… I’d just be boring wouldn’t I? I’d have nothing that’s good about me!” Finlay

Many described how music-making provided them with a unique medium to explore their emotions, reflect, and express their feelings honestly:

“I was in a terrible place, really depressed. I don’t feel anything near as bad as I was back then. I used music as a tool to express myself, to talk without having to say anything to anyone.” Chi

Using music as a means of communication was a common theme. We heard how song-writing allows young people to express thoughts and feelings that might otherwise go unvoiced, leading to improved understanding of others and therefore better relationships:

“When my dad heard the song… something changed, it was a good change, but it’s connected us more as a family, instead of just talking. I didn’t really tell my dad how I felt, I didn’t really tell my mum how I felt, [then] I did, and now they’ve realised what’s going on, so we can actually connect instead of arguing cause we’re not telling each other stuff.” Filip

Once this song was published on YouTube and on the radio, my dad was like ‘why don’t we do it?’ He was like ‘we could make one like that, but what I feel as well’, so it’s kinda helped us. You can talk, you can sing, you can express feelings in a way that you didn’t really think you could with, a person you didn’t really think you could do it with.” Shelby

There is significant research demonstrating the power of music in improving mood and aiding in the treatment of health issues. Music-making has been shown to diminish anxiety, stress and self-harm; and to increase communication and coping strategies for young people in child and adolescent mental health settings20. Singing in particular has been shown to improve mood and increase relaxation21 – which was corroborated by some of our interviewees:

“Singing, music is a way for me to escape all the bad thoughts and emotions that I feel. Even if you don’t wanna sing in front of anybody else, just sing in your bedroom – it just helps. When you’re in a good mood, sing, when you’re in a bad mood, sing, it just helps.” Kyle

“When I’m singing I feel happy.” Fabrice

Music to combat loneliness

Young people are more likely than any other generation to be lonely, with 10% of people aged 16 to 24 identifying as ‘always or often lonely’, three times higher than people aged 65 and over22. Indeed, a high percentage of young people in our research reported that they felt lonely. Those who made music in the last week, however, were less likely to say they ‘often feel lonely’.

One of the reasons why music helps combat loneliness is because it’s often undertaken as a group activity, and is a way of making new friends.

“[Coming to the project] makes you feel better within yourself, and you make so many friends for life.” Hannah

Our study found that almost half (48%) of young people who play instruments do so in a group, and 87% of those who sang in a group also spent time together outside of music-making sessions. Our interviewees explained how making music with others has enabled them to develop meaningful friendships:

“I enjoy it because I make lots of friends, it makes me work with them all the time, never leave them, play all the time music, never give up with them, always stay with them.” Filip
Jo Stockdale, Well Within Reach, formerly known as Child circumstances."

Regular participation in group musical activities can strengthen social cohesion by increasing empathy and co-operative behaviour. Making music in groups has wider social value – besides the development of individual friendships – by providing opportunities to communicate and connect with other people and a sense of belonging:

"Making music with other people is related to some deep-seated instincts; we have an instinct for moving together and consolidating the 'in' group. So, thinking back to when we were tribes; we have a sense of belonging and we feel part of that group."

Professor Susan Hallam, Professor of Education and Music Psychology at UCL.

Young people’s view of their future

I don’t think we can underestimate the importance of judging every child’s ability to believe they have a choice and that they have power over their own circumstances. Jo Stockdale, Well Within Reach, formerly known as Child Learning & Development Advisory Centre.

We found that making music and being musical is linked to young people feeling more in control of their lives. Young people who see themselves as musical are more likely to look forward to their future and more likely to enjoy school than those who don’t identify as musical. 70% of those who regularly make music say they feel in charge of their future, compared to 60% of those who don’t:

"We’ve always been really outspoken. It hasn’t changed my confidence in how I talk around people, how loud I am. [But] it’s changed my confidence about myself – like my security about how well I can do, what I think about myself and what I can achieve."

Taz

The experiences of young people included in our study align with the wider evidence – that listening to and playing music is a vital way of regulating and articulating emotions, developing social bonds and feeling more in control of life. Young people are using music as a resource to draw on, a coping mechanism to support their personal wellbeing. They’re doing this creatively, strategically and – often – independently. There’s an opportunity therefore for schools, charities and arts organisations to support young people to use music in this way. To re-imagine the purpose of music and music education for social and wellbeing outcomes. And in doing so, make it more inclusive and impactful.

5) A DIVERSE TALENT POOL OF YOUNG PEOPLE SUPPORTS THE FUTURE OF THE MUSIC INDUSTRY

More young people from all backgrounds are making music, and the music industry – after adapting to new technologies and changing listening habits – is a growing area of the UK economy. It’s a future source of jobs for today’s young music makers. In 2016, the music industry contributed £4.4 billion to the economy – up 6% on the previous 12 months, with exports across the whole sector rising by 15% to £2.5 billion. The wider UK music industry was responsible for the employment of 142,200 people in 2017.

But there is a gap that exists between music education and the music industry, meaning that young people often aren’t aware of the opportunities available, or the paths they need to follow to pursue a musical career. This is limiting the size of the talent pool and may be hampering the country’s future competitiveness. There is a real opportunity for the industry and education sectors to join up to provide more inclusive pathways to success, both for artists and those working behind the scenes.

Getting a job in the music industry

The top three artists that our respondents listened to – Ed Sheeran, Little Mix and Stormzy – found their way to the top of the charts through independent releases, X Factor and YouTube respectively. Although the X Factor model has its critics, it has opened up a previously opaque and impermeable route to stardom, meaning young people of any background or part of the country can see a way to a musical career. Yet those who achieve success through this route are only a tiny minority of those who share the same dream.

Our research has demonstrated the increasing numbers of young people creating and accessing music in their own way, without formal guidance. Traditional routes to musical success seem increasingly insurmountable to many young people.

"Loads of people try and get rich off music and they fail, they go through ups and downs, it’s complicated … you get people snaking you, using you just to make money from you, you know, there’s so many obstacles."

Taz

There is a lack of support and education for young musicians to learn about the breadth of possible music-related careers, and how to pursue them. And in many instances, there are genuine barriers that young people are well aware of. Several of our interviewees voiced concerns about their ability to gain employment in the music industry:

"I think it’s actually worrying me now, ‘cos I genuinely don’t know what I want to do. I was going to do something in music, like, [the music leader] was like ‘are you thinking of doing music?’ and I was like ‘I don’t know, ‘cos there’s not many jobs in it.’"

Finlay

I’d like to do it more, but there’s not really anything out there for young people like myself to go and make music, because there’s not enough funding, or it’s too far away, or the apprenticeship people can’t support your travel to get there each and every day … I’d need a lot more help than what they offer here […] more support in getting a job in the [music] industry."

Leah

It’s something I just want to keep doing in the future, whether I can make a career out of it or just as a hobby on the side I don’t know yet, but it’s definitely something I want to keep on doing." 43

Fifty-five percent of respondents to Youth Music’s 2017 Stakeholder Survey echoed these concerns, saying that they felt the music industry wasn’t doing enough to open up progression routes into work. They called for young people to have more access to venues and equipment, performance and promotion opportunities, professional mentoring and work experience.

Diversifying the music industry

Due to systemic biases and the concentration of jobs in the capital, the demographics of those currently working in the music and the wider creative industries are not representative of the population as a whole. This is exacerbated by the continued practice of unpaid internships to gain entry-level employment. Whilst we know many of the largest employers do offer paid internships, recent research found that 86% of internships across the arts industry were unpaid. According to UK Music’s 2016 workforce diversity survey:

- Two thirds of music industry workers are based in London
- The overall proportion of staff from BAME backgrounds is higher than the national average but lower than the average for London.
- Women are slightly underrepresented compared to the national population – but young female industry workers slightly outnumber their male counterparts

While the UK Music survey doesn’t measure social class, a separate creative industries survey found that over a third of the creative workforce in the capital are from upper-middle class origins, compared to 23% in the rest of the UK.

The industry has been taking concerted action to improve its workforce diversity, measuring progress through an annual survey conducted by UK Music. There is recognition of the need to nurture diverse talent of tomorrow. Although real and concerted efforts are
The Sound of the Next Generation

Being made to improve diversity there are still issues of underrepresentation, particularly among composers and performing artists:

“A lot of this is down to the record labels and the fact that they are not signing enough female musicians or songwriters. With songwriting Masters programmes the gender ratio is 50/50. So the talent is out there.”

Vick Bain, CEO of the British Academy of Songwriters, Composers and Authors (BASCA)

And there are far fewer opportunities for people outside the capital:

“It’s alright in London, in London there are more opportunities but it’s once you go outside London there are less opportunities there.”

Rebecca Allen, President of Decca Records UK

Where artists from outside London have achieved success, they are inspiring young musicians up and down the country:

“One person that I know in this building will … do what Bugzy Malone did for Manchester. D’ya know what I mean, just give Cambridge the recognition that it needs.”

Kallum

Some of the most exciting British musical developments of recent decades – jungle, drum’n’bass, UK garage, UK Grime, grime – have come out of self-taught, young, working class communities. If music industry organisations don’t have a representative workforce, then they’re less able to tap into the diverse talent pipeline.

“A lot of these artists are self-released and now the industry is catching up because they missed the opportunity to sign and develop them initially. So who knows what talent has fallen by the wayside?”

Vick Bain, CEO of the British Academy of Songwriters, Composers and Authors (BASCA)

A win-win for education and industry

Routes into industry are changing, and emerging artists need to know the best way to navigate the pathways. It’s not enough to have talent – you need to have a decent social media following to even get a foot in the door. The role of A&R is changing as data and insights increasingly inform decisions. Does this result in the industry predominantly backing the safe bets – and if so, how does a talented bedroom musician get discovered?

The music industry is concerned about its diversity and the talent pipeline of tomorrow. At the same time, there are plenty of children and young people from diverse backgrounds making music. Aside from a few time-limited projects, the industry and education sectors have failed to join up their talent development strategies at a national level. Work has started but this now needs to move beyond the rhetoric to concerted action.

Greater collaboration would be a win-win situation for music education and the music industry. An opportunity to make music education more inspiring, relevant and industry-facing, so that young people progress with the required skills and experience for the workplace. At the same time, stronger partnership working with music education organisations can serve as a new form of A&R for the industry, one which can diversify content and widen the talent pool.

6) Music has the power to make change for the next generation

The evidence presented in this report has given us at Youth Music an up-to-date picture of young people’s engagement with music and allowed us to analyse how this can be capitalised on for the benefit of individuals, the economy and society. There’s clearly lots to celebrate – but also great opportunities for change in order to maximise the positive benefits that music brings. We believe these changes need to be brought about by policy-makers, educationalists and those working in the music industry. We’ve addressed our recommendations to each of these groups.

Policy-makers

• The government should continue to recognise the wide-ranging benefits that a rich and diverse music education brings – for young people, for wider society, and for the economy – and the level of state investment should reflect this.
• The growth of music and creative industries opportunities outside London should be encouraged by funders and policy-makers, ensuring investment is more equitably spread in future years and aligned to local and regional economic and cultural policies.
• With increasingly tight budgets, the remit for public music education funds should be targeted towards those who face greatest barriers to access, and with a focus on outcomes and quality.
• Those involved in supporting young people’s wellbeing should give greater consideration to the role that music can play, and how young people’s passion for listening to music and their everyday creative lives can be interwoven with wider strategies to support good mental health.

Music education

• Music education in schools must be maintained but should be re-imagined, with a new model – supported and valued by Ofsted – that’s more aligned with young people’s existing musical identities and with outcomes that go beyond attainment to better capitalise on music’s social value.
• Music education should be more industry-facing in its curricula and partnerships and better consider the needs of DIY musicians. Digital technologies should be embedded, and programmes should prepare young people for a wide variety of industry roles including what’s required to have a successful freelance career.

Music industry

• To support a diverse pipeline of talent to enter the music industry, all organisations should pay the real Living Wage and follow the Internship Code of Practice.
• The music industry should work even more closely with educational organisations to help bridge the gap between education and industry, including cash investment by those with the most resources and provision of in-kind support from others.

It’s not enough to have talent – you need to have a decent social media following to even get a foot in the door
Methodology

Ipsos MORI surveyed 1,001 children and young people in England aged 7-17 online between 27 February 2018 and 9 March 2018. Quotas were set to ensure a sample representative of location, gender and age, matched to ONS census data (mid-year 2016). Children under the age of 11 completed the survey with their parents.

Youth Music carried out a series of qualitative interviews with young people who have participated in projects funded by the charity, and Ipsos MORI conducted in-depth interviews with experts in a variety of music and youth-related fields.

In Youth Music’s previous Omnibus survey ‘Our Music’ (undertaken in 2006) – 1,295 young people aged 7-19 were selected to be representative of the UK population by age, gender, social grade (ABC1, C2, DE) and geographical region. Responses to a mixture of pre-coded and open questions were collected via face-to-face interviews with prompt cards.

The young musicians

Chi, Ark T Music Project, Oxford

Chi, 21, attended the ‘Beat Route’ project run by the Ark T Centre in Oxford, funded by Youth Music. He’s now studying audio production at the SAE Institute and working towards a career in music. It’s a big turnaround after going through some tough challenges when he was younger – dropping out of school, experiencing depression and overdosing on medication.

Fabric*, Northumberland, Tyne and Wear

Fabric*, 18, took part in the ‘Singing for Health’ project run by Northumberland, Tyne and Wear NHS Foundation Trust, Newcastle

The four girls (aged 12-14) took part in a music-making project run by My Pockets at the Astra Young Carers group in Hull. They’re all carers for siblings or parents who have additional needs or long-term health problems. As part of the project, they co-wrote a song about their experiences, which was recently played on BBC Radio Humber. Song writing has helped them express their emotions and improved their relationships with their families.

Dwight, Charlotte and Finlay, Brighter Sound, Manchester

Dwight, Charlotte and Finlay (aged 14-15) all took part in Brighter Sound’s Exchanging Notes project as part of their classroom music lessons at Manchester Creative and Media Academy – and now they all take GCSE Music.

Leah, Pedestrian, Corby

Leah [18] is a rapper who takes part in Pedestrian’s project ‘Concept’. She is also studying Level 2 Graphic Design at college and is undertaking her Gold Arts Award portfolio with support from The Henry Martin Fund.

Taz and Kallum, Romsey Mill, Cambridge

Taz [17] has been taking part in projects run by Romsey Mill for three years. She is also at college studying Psychology, Sociology and Criminology. Kallum (24) has been taking part in projects run by Romsey Mill for about ten years. He is now beginning to take on some additional responsibilities as a music leader with younger participants.

Filip, Gem Arts, Newcastle

Filip, 14, is a jazz drummer who takes part in the ‘East by North East’ project run by Gem Arts in Newcastle-upon-Tyne. The project offers music-making opportunities for young people from BAME, asylum seeker, refugee and wider communities across the city. Filip’s been attending sessions at the North Benwell Youth Project for the last six years, and plays in a group with friends who are also from an Eastern European background.

The expert interviewees

The following people kindly gave up their time to offer their considerable perspectives on the youth music landscape:

Professor Sue Hallam

Professor Susan Hallam is Emerita Professor of Education and Music Psychology at the UCL Institute of Education. She was awarded an MBE in the 2015 New Year Honours list. She is the author of a number of influential books and papers in the field of music psychology and education including ‘The Power of Music’ (2001), ‘Music Psychology in Education’ (2005), and most recently ‘The impact of actively making music on the intellectual, social and personal development of children and young people: A research synthesis’. She is the editor of the Oxford Handbook of Psychology and Music and is a lifetime member of the International Society for Music Education.

Jo Stockdale

Jo Stockdale is a programme director at Well Within Reach formerly the Child Learning and Development Advisory Centre (CLADAC) whose specialism is understanding the role of creativity in aiding young people’s social and emotional growth. Well Within Reach is a national organisation providing training and consultation for children and young people’s services. Jo has created and run a number of training programmes including ‘Understanding resilience’ and ‘Using creativity to build attachment in early years settings’.

Vick Bain

Vick is the CEO of BASCA, the British Academy of Songwriters and Composers - an independent association representing songwriters, composers and authors. Members include Sir Paul McCartney, Sir Elton John, Chris Martin, Kate Bush and Dizzee Rascal. BASCA also organises the Ivor Novello awards.

Rebecca Allen

Rebecca is the President of Decca Records in the UK. After studying at the Trinity College of Music in London, Allen started her career at the BBC where she worked with the BBC Symphony Orchestra and later the BBC Proms. She joined Universal Classics & Jazz in 1999 and remained with the label after it was re-named Decca Records UK in 2009. Since 2015 Allen has been a board member of Trinity Laban Conservatoire of Music and Dance. *name changed
ENDNOTES

3. www.bbc.co.uk/news/education-39154242
7. All identifiable artists were assigned genre categories from their Wikipedia entries [Sept. 2018]
10. open.spotify.com/genre/2017-top-playlists [accessed 25/10/18]
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