The Impact of Three London Conservatoires on the UK and London Economies

A Project for the Royal Academy of Music, the Guildhall School of Music and Drama and the Royal College of Music, with Universities UK

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Executive summary

This report asks how three of London's conservatoires – the Royal Academy of Music, the Guildhall School of Music and Drama, and the Royal College of Music[1] – contribute to the London and UK economies. The research used statistical and interview evidence to determine the costs of education at these institutions and to estimate the benefits that flow from their presence in London and the activities of their graduates.

The mission of the three conservatoires centres on the training of Higher Education students in performance and musical composition. Together they have a total of some 2,150 students, almost a third of all those who study at a British conservatoire. About half of their students are from the UK, with all regions of the country represented. Roughly half their international students come from outside the EU, and each institution has student representation from over 50 countries worldwide.

The three conservatoires spend about £48 million per annum in total. About 60% of this goes on the staff costs necessary to provide advanced, intensive training in music. Total teaching costs per student are comparable to those for other highly specialised courses in the UK such as medicine and veterinary science. Comparison with similar music institutions in the USA suggests that the conservatoires' spending is low given the world-class standards achieved.

The institutions' income was £49.6m in 2009/10. About two-thirds came from fees and government grants. Fees brought in some £15 million in 2009/10, with over 40% of this income coming from non-EU international students. This represents a minimum of £17 million in UK exports.

Central government grants totalled £12.6 million in 2009/10.[2] This includes so-called 'exceptional funding' of just over £5 million to the RAM and RCM to cover the additional costs specific to advanced training in music which is based on individual tuition. The Guildhall School of Music and Drama receives a grant from the City of London of over £5.5 million per annum for similar purposes in music, drama and technical theatre.

The cost to government of advanced musical training at these three conservatoires should be seen as an investment that helps generate very large benefits for the London and UK economies. To put this in context, the annual output of London's creative industries has been estimated at up to £25 billion.

There are some 50,000 performing musicians in the UK. While these three conservatoires train only a relatively small proportion of this total—maybe about 10%—they produce many of the highest-achieving musicians. For

[1] At the time this report was commissioned Trinity Laban was not a member of Universities UK and was therefore not included.

[2] The amount of grant received by the three institutions has fallen in recent years and stands at £11.3m in 2011/12.

instance, graduates of the three conservatoires account for over half of players in the four major London orchestras. Calculations of tourist revenue from musical theatre suggest that ticket sales to overseas visitors produced about £59m in 2010 and classical music may well have produced a further £8m.

The work of the conservatoires' graduates has further, less direct effects. Many tourists come to London specifically to see shows—or would not come without them—so all their expenditure depends on the strength of London's music industry. More generally, classical music and musical theatre produced over £700 million of value added in 2010. The conservatoires form part of London's music industry eco-system; many of its services and activities would not exist if it were not for the concentration of highly skilled professional musicians in London. Despite the recession, creative industries continue to act as engines of economic growth and innovation, and the UK has the largest and fastest growing creative sector in the EU

The conservatoires provide social benefits by promoting educational, artistic and outreach projects which make music more accessible and help generate the next generation of musicians. They encourage excellence in music teaching.

Conclusions

The conservatoires are a key factor in the development and sustainability of London as a world music centre. Their graduates are heavily involved in the classical and modern music production which is crucial to London's role as a leading centre of the arts. (London's position in the global music hierarchy is probably only equalled by New York's.) The conservatoires are an integral part of a network that provides London with benefits arising from this agglomeration both in terms of the music industry and through its symbiotic relationship with tourism, other creative arts, and the cultural industries generally.

SUMMARY TABLES: Costs of conservatoires and benefits to UK economy

	Costs (direct)	Benefits (direct)
Total annual income of three conservatoires (2009/10), of which	**£49.6m**	
Tuition	£15.1m	
Annual central government grant, of which	£12.6m	
Exceptional funding	£5.3m	
Direct export income (fees, etc)		£17m

Economic sectors to which conservatoires contribute indirectly	
Annual London musical theatre and classical ticket sales to overseas tourists (estimated)	£67m
Annual value added from classical music and musical theatre (estimated)	£700m

Sources: Report tables and text; HESA statistics 2011-12

Introduction

This report examines the impacts of three of London's conservatoires – the Royal Academy of Music, the Guildhall School of Music and Drama and the Royal College of Music – on the London and UK economies. It analyses students, staff and the economic effects of the institutions within London and the UK more generally. Such a study is of particular importance at a time of public expenditure austerity and when thought is being given to the future of the British economy.

The three conservatoires have a long and distinguished history. They were founded respectively in 1822 (RAM), 1880 (Guildhall) and 1882 (RCM) and have played a major role in the development of London as one of the world's leading music cities. The outputs of the conservatoires (trained graduates) are a key element in the likely future economy of the country. Classical and modern music production in various forms is an important part of the creative industries that have prospered in Britain in recent years. London, in particular, is recognised as a leading centre of music and dance, galleries, museums, and theatre. These sub-sectors allow bigger industries – such as television, radio, advertising and the new media – to flourish across the country.

The purpose of the report is to analyse the scale and impacts of the conservatoires within the London and UK economies. The institutions are internationally respected, though their operations are rarely considered in a broader context. For example, each of the three has a significant throughput of international students who pay fees that count as 'exports' for the British economy. Similarly, the graduates of the institutions make it possible for other creative sectors to flourish in the UK. Although the conservatoires may at first sight appear relatively modest contributors to economic output, it is evident that their impacts are far greater because of the way they allow output to expand in related industries.

Economic impacts aside, there is intrinsic merit to the work undertaken in the conservatoires. Although it is far harder to quantify the benefits of music education to wellbeing and social development more generally, few would doubt there are such benefits. In a tangible way, the three institutions are involved in outreach activities to schools and the wider public. Such knowledge exchange provides benefits to individuals who would otherwise not be able to access live music.

This project has also sought the views of leading individuals in the UK music industry to test their opinions about the three London conservatoires. Structured interviews were undertaken with a range of people involved in the creative industries, Arts Council England, arts administration and leading orchestras. The purpose of these interviews was to test the strengths and weaknesses of the existing system of advanced music training in the capital, and to seek external and independent views about the three conservatoires in their London context.

Higher education institutions face a radical reform to their funding system. The three conservatoires will be required to justify their existing funding, along with other colleges of different kinds. There is no doubt that providing advanced musical education in a big city is a costly and intricate business. But there are also enduring benefits from investment in such institutions. The sections that follow explore both the costs and benefits of one of the world's leading agglomerations of music education and training.

1. Students and staff

The three conservatoires analysed in this report represent a unique element of UK higher education. As Table 1 shows, there are 2,151 students in total within the institutions, of whom 53% are undergraduates and 47% postgraduates. The institutions overall account for just under a third of all UK conservatoire students, or broadly 0.5% of London's higher education numbers.

These institutions therefore represent a small but important 'niche' group within London and the UK's higher education system. It is against this background – of a modest number of specialist students – that the conservatoires need to be seen. The conservatoires, though part of the country's university sector, are an unusual sub-group which has more in common with equivalent clusters in other 'world' cities than with the generality of UK higher education.

Table 1: Student numbers

	RAM (2010/11)	Guildhall* (2010/11)	RCM (2010/11)
Undergraduate	330	402	388
Postgraduate	407	264	360
TOTAL	737	666	748
Three colleges total			2,151
Total UK conservatoire students (2009/10)**			6,919
Total university students in London			402,500

Source: RAM, RCM, Guildhall, HESA student and qualifier statistics

**Guildhall teaches both music and drama; these data are for music students only*
***At these three plus the following institutions: Leeds College of Music, Royal Northern College of Music, Birmingham Conservatoire, Trinity Laban Conservatoire of Music and Dance, Royal Conservatoire of Scotland, and Royal Welsh College of Music and Drama. Figures include dance and drama students at the last three institutions.*

Table 2 shows the origins of students at the three conservatoires. About half of all students are British, though the proportion among undergraduates is higher. Some 24% of the students in the three institutions originate from outside the European Union, with the remaining 76% from the UK or the EU (see Tables 2 & 3).

The overall balance between UK and overseas (EU and the rest of the world) students suggests the three conservatoires are rather more international in their orientation than the average for London institutions. The 499 'overseas' students are important because they pay full cost fees, contributing not only to the resources available to British HE but also to the country's exports. This issue will be considered further below.

Table 2: Origins of students: UK, EU, non-EU (number/%)

Origin	RAM (2010/11)		Guildhall (music only) (2010/11)		RCM (2010/11)	
	UG	PG	UG	PG	UG	PG
UK	183 (55%)	211 (52%)	293 (73%)	127 (48%)	233 (60%	159 (44%)
EU	50 (15%)	90 (22%)	86 (21%)	67.5 (25%)	75 (19%)	79 (22%)
Non-EU international	97 (29%)	106 (26%)	23 (6%)	69.5 (26%)	80 (21%)	122 (34%)
TOTAL	330	407	402	264	388	360

Source: RAM, RCM, Guildhall

Although the conservatoires are in London, they are – in reality – national resources. Table 3 shows that, as with most of the highest-ranking universities, their students come from all over the UK. And as with many other colleges in London, London and the South East are somewhat overrepresented, as is Wales.

Table 3: Origins of UK students by region

Region	Students	Population
	% of total enrolled numbers from each region	% of UK population
South East	27	13
London	17	13
West Midlands	8	8
East of England	7	9
South West	6	8
Yorkshire and the Humber	6	8
Scotland	6	8
North West	6	11
Wales	5	4
East Midlands	4	7
North East	1	4
Northern Ireland	.7	2
UK students without UK address	6	

Source: RAM, Office for National Statistics, Table 8a Mid-2010 Population Estimates

2. Finances: fees, income and expenditure

Tables 4 and 5 show the fees charged by the three colleges for full-time taught courses in 2011/12 and agreed for 2012/13. The second of these years is when the government is introducing the new university funding system, under which colleges are required to charge higher fees to replace reductions in grant.

Table 4: Fees 2011/12 (£) for full-time taught courses

		RAM	Guildhall	RCM
Undergraduate	UK & EU students	3,375	3,375	3,375
	Overseas students	18,100	16,760	18,600
Postgraduate	UK & EU students	6,400–13,000	7,375	8,250–10,860
	Overseas students	6,400–21,600	16,760	18,900–24,750

Source: RAM, Guildhall, RCM

Table 5: Fees 2012/13 (£) for full-time taught courses

		RAM	Guildhall	RCM
Undergraduate	UK & EU students	9,000	9,000	9,000
	Overseas students	18,500	18,250	19,200
Postgraduate	UK & EU students	6,600–14,000	8,030–9,400	5,620–11,140
	Overseas students	6,600–22,000	18,250	13,800–24,750

Source: RAM, Guildhall, RCM websites

Table 6 shows the most recent figures for fee income from UK, EU and overseas students. Income from overseas fees makes up 22% of fees at the Guildhall and more than half at the Royal College of Music. These proportions will be significantly different in future years, however, after the new fee regime for UK and EU students is introduced. The three institutions' total fee income from overseas (non-EU) students was just over £8m in 2009/10 (Table 6), though with accommodation and other spending added in the students' expenditure would likely be closer to £13 or £14 million. All spending of this kind (with the exception of any UK-funded scholarships or bursaries) is an export to Britain. The three conservatoires therefore make a modest contribution to improving Britain's international trading position.

Table 6: Income from UK, EU and overseas fees, 2009/10 (£000)

Fee income	RAM	Guildhall*	RCM	Total
UK/EU students, of which	3,329	2,823	2,382	8,534
UK students (estimate)	2,463	2,061	1,715	6,239
Other EU students (estimate)	866	762	667	2,295
Non-EU students	2,965	811	2,776	6,552
Total	6,294	3,634	5,158	15,086
Total from non-UK students	3,831	1,573	3,443	8,847

*Guildhall figure is all fee income, including fees for drama. Almost all non-EU student income is from music rather than drama.
Source: LSE London calculations based on RAM, Guildhall, RCM Reports and Accounts for the year ended 31 July 2010 and figures in Table 2

Table 7 shows the income and expenditure of the three conservatoires on higher education (that is, excluding the junior conservatoires). Figures are the most recent available. The Royal Academy and the Royal College have very similar expenditure of about £17 million each, while Guildhall's spending is slightly lower. (Guildhall teaches both music and drama; its music-related expenditure is approximately £6 million.) The three organisations therefore have an annual expenditure of around £48 million. About one-third of the conservatoires' funding is derived from students' fees, and in turn about 40% of these come from non-EU overseas students.

Table 7: Higher education income and expenditure of three conservatoires: 2009/2010
(excludes income from and expenditure on junior conservatoires)

	RAM	Guildhall (music + drama)	RCM
Income, of which	**17,372**	**15,711***	**16,534**
Tuition	36%	32%	36%
HEFCE core grant	12%	20%	8%
HEFCE exceptional funding	15%	0%	17%
Other	37%	City of London grant 36% Other earned income 12%	40%
Expenditure, of which**	**16,512**	**15,643***	**15,936**
Staff costs	57%	62%	58%
Other	43%	38%	42%

*Guildhall income and expenditure figures exclude overheads paid to City Corporation
**% expenditure figures calculated from total expenditure INCLUDING junior conservatoires
Source: LSE London calculations based on HESA 2009/10 Finance Statistics (Tables 3, 4, 5 & 7) and information provided by RAM, Guildhall and RCM

The Royal Academy and the Royal College each receive 'exceptional funding' from HEFCE in recognition of the higher costs of education within

conservatoires; this exceptional funding is about twice as much as the HEFCE core grant. The Royal College of Music received £2.8 million in exceptional funding in 2009/10, while the Royal Academy received £2.6m. The Guildhall does not receive any exceptional funding from HEFCE as the City of London provides resources to the School on an analogous basis. In total, HEFCE allocates RCM and RAM just over £5 million per annum to contribute to their specific costs.

According to the RCM, exceptional funding is provided in recognition of the following particular requirements of conservatoires:

- One-to-one teaching
- Complementary core training
- Large-scale activities under distinguished visitors
- Masterclasses
- Public performances
- Exceptional space costs (large public performance spaces; ensemble rehearsal rooms and sprung-floor studios, sound-proofed teaching facilities; recording and editing studios)
- Intensive auditioning and assessment (bespoke, labour-intensive application and audition process) [RCM 2008]

For each of the institutions, the main items requiring exceptional funding are professional teachers and accommodation.[3] Around 90% of the extra resources are associated with these spending heads, reflecting the need for high levels of individual tuition. For many types of advanced musical education, such staff:student ratios are inevitable, though they are not required in most other forms of higher education, even medicine.

The conservatoires concentrate on performance skills which, as throughout the world, are developed in students by one-to-one tuition from those already experienced in performance. According to one expert,

> In the classical canon of the conservatoire educational sector (i.e., training in chamber music, orchestral music and opera), it is understood that professional instrumentalists achieve technical excellence through systematic training focused both on ensemble and solo practice. (Purcell 2002)

This is an extremely expensive form of teaching. However, because of the synergies between teaching, learning and performing, many performers including international names give their time to teach at relatively low rates of pay: one of the benefits of the London agglomeration.

[3] Individual tables on the composition of exceptional expenditure at the three institutions can be found in Appendix A.

Higher funding for certain music colleges will inevitably lead to a debate about the justification for such resources. One way of putting this additional funding in context is to compare the fees charged to non-EU students, which should reflect the full costs of education, with those charged by comparable elite institutions in the USA (Table 8). The American colleges receive little government subsidy, so their fees can be expected to be a good indicator of their costs (or indeed to be lower than their costs, as many US colleges have large endowments). Existing fee levels at the three colleges are somewhat below those charged by, say, the Juilliard School in New York and the Eastman School in Rochester, NY, which implies that the three London institutions are, broadly, using their 'exceptional' funding efficiently.

Table 9: Tuition fees at other international conservatoires

	Guildhall School of Music & Drama	Royal Academy of Music	Royal College of Music	Juilliard, New York City	Eastman School of Music, Rochester, NY	Curtis Institute of Music, Philadelphia, PA	Paris Conservatoire	Sibelius Academy, Helsinki	Hochschule für Musik und Theater, Munich
Country	UK	UK	UK	USA	USA	USA	France	Finland	Germany
Fees 2011/12	UG home £3,375/ Overseas £16,760 PG home £7,375/ Overseas £16,760	UG home £3,375/ Overseas £18,100 PG home £9,500/ Overseas £19,300	UG home £3,375/ Overseas £18,600 PG home £8,250/ Overseas £18,900	$33,630 (£21,343)	UG: $41,040 (£26,046)	None	589 EUR (£491)	None	UG: 500 EUR (£417) PG: 300 EUR (£250)

Source: Websites of each institution. Exchange rates as of 1 February 2012.

On the other hand, the fee figures from Table 8 suggest that the three UK conservatoires are expensive for students when compared to the leading European counterparts. The European colleges generally receive very generous subsidies, so their fees are very low and probably come nowhere near covering their costs. Without recourse to government subsidies, the fees of the London conservatoires would inevitably rise, affecting their competitive position vis-à-vis the other music colleges in the continent and the USA.

It is instructive to compare the finances of the three London institutions with those of Juilliard in New York City, one of the few institutions that operates at the same level. Juilliard was set up in 1904 because there was no world-class conservatoire in the USA. Like the London conservatoires, Juilliard employs notable musicians as teachers. It is as selective as its UK counterparts: it accepts fewer than 10% of applicants, who are themselves self-selecting because of the standards required.

Where Juilliard differs importantly is in its funding model. Its fees are around $34,000 per annum; for those who study a second instrument the additional cost is $9,300 per annum. Although significantly higher than the fees charged by London conservatoires, Juilliard's fees are well below its actual costs, which are estimated at around $80,000 per student. The school has endowments that cover 44% of costs. These are partly used to provide scholarships for students—recent growth in endowments of $85m specifically for scholarships has allowed them to increase the average scholarship by over $7,000. Juilliard is currently working on raising $300m for its second centenary fund to provide for buildings, performance spaces and students. As with other US universities, it expects to attract donations from alumni, wealthy benefactors and local residents. The British higher education system finds it far harder to raise endowment funding in this way, as this country does not (yet) have the tradition of private philanthropy – and in particular support for one's alma mater – that obtains in the USA.

Another way to assess the conservatoires' spending is to compare their average teaching costs per student (unit) to that of other highly specialist courses, as detailed in Table 9. The Higher Education Funding Council for England divides courses by cost into four bands; Band A is the highest, and covers clinical dentistry, medicine and veterinary science. (Music falls into the lower-cost Band C, which covers subjects with a studio, laboratory or fieldwork element, including the performing arts, but HEFCE compensates the conservatoires for their exceptional costs with a special funding supplement.)

The figures show that average teaching costs per student in the three conservatoires are comparable to those for 'Band A' subjects. This comparison, while broad-brush, demonstrates that many courses offering highly specialised training have high unit costs due to the elevated expenditures required for the acquisition, use and maintenance of technical equipment and infrastructure. The conservatoires are not unique in this respect.

Table 9: Comparison of teaching cost per student in conservatoires with costs for Band A subjects (2008/09)

Subject	Full Average Cost of Teaching Students £ (actual outturn)
Clinical dentistry	17,144
Clinical medicine	17,184
Average RAM, Guildhall & RCM	18,658
Veterinary science	20,536

Source: Calculations based on Transparent Accounting Cost Return [TRAC(T)] data for conservatoires and Band A elements

3. Clustering: the benefits of agglomeration

Since the 1980s, policy-makers worldwide have increasingly understood creative industries[4] as catalysts of urban growth and development, resulting in a plethora of cultural planning programmes. The current UK Coalition government publicly supports the creative industries as knowledge-based businesses that can help rebalance the economy.[5] A 2003 World Bank report on this topic states that more than 50% of consumer spending in G7 countries is on creative industry outputs and that they account for 7% of the world's GDP (Yusuf and Nabeshima 2003). A more recent 2010 UNCTAD/UNDP report noted that over the period 2002–2008, creative industries were more resilient to the impact of global economic crisis than traditional manufacturing industries, and that global exports of creative goods doubled, with an average growth rate of 14% (UNCTAD and UNDP 2010).

Table 10 puts the cultural and creative industries in the UK in context. They are an important economic sector—various studies have estimated their contribution to UK gross value added in the range of 5.8% (2003) to 6.8% (2001). They contributed 3% to GDP, more than real estate, the food and beverage industry or the computer industry.

Table 10: UNCTAD estimates of creative/cultural industries' contribution to UK, 2003

Category	Contribution to economy	
Contribution of cultural industries to UK GVA	Value (m)	42,180
	% of Gross Value Added	5.8
Contribution of creative industries to UK's GDP	Value (m)	3,700
• music/visual and performing arts	% of Gross Value Added	.50
Contribution of cultural sector to national economy in 2001 (in Euros)	Turnover (b)	165.4
	Value-added (b)	85.0 or 6.8%
	Employment (m)	1,300 or 4.3%
Comparison of contribution with other sectors (% GDP)	Cultural	3.0
	Manufacturing food, beverages, tobacco	1.9
	Real estate	2.1
	Computer & related	2.7

Source: UNCTAD/UNDP 2010

In the UK context, several studies have found that despite the recession, creative industries continue to act as engines of economic growth and innovation (Museums, Libraries and Archives Council 2008; UKCES 2008; Brinkley and Holloway 2010; Reid and Albert 2010). They have been found to be the largest and fastest growing creative sector in the EU, generating increasing levels of employment (see Appendix E for data on employment levels). The DCMS in 2008 estimated that they contributed 5.6% of the UK's Gross Value Added and that the sector exported services worth £17.3 billion, or 4.1% of all exported goods and services (DCMS 2010b).[6] More recent studies demonstrate that as a share of GDP the UK has the largest cultural economy in the world, employing more than 678,000 individuals and contributing £28 billion to the UK economy every year (Creative & Cultural Skills 2011: 14).

[4] Appendix C treats definitional issues around the creative sector in more depth.
[5] See David Cameron's 28 May 2010 speech 'Coalition Strategy for Economic Growth': http://www.number10.gov.uk/news/transforming-the-british-economy-coalition-strategy-for-economic-growth/
[6] See http://www.culture.gov.uk/what_we_do/creative_industries/default.aspx#Creative

The music sector constitutes a sizable portion of that cultural industry, contributing £31,800 per head per year and comprising 7,900 businesses (Creative & Cultural Skills 2011: 4). According to DCMS 2010 data, two-thirds of the businesses in the creative industries are in two sectors, one of which is music and the visual & performing arts (the other is software and electronic publishing) (DCMS 2010b). According to the same source, musical and visual and performing arts together account for £3.2bn of GVA in 2008, with film, video and photography adding a further £2.7 billion. Together these two sectors made up 0.6% of UK GVA. The performing arts sector contributes £44,000 per head each year to the UK economy, which is more than the average per head in the creative and cultural industries more generally (Creative & Cultural Skills 2010).

Conservatoires are part of a larger eco-system that economists and geographers of spatial agglomeration describe as 'clusters'. The theory, which draws extensively from Michael Porter's 'competitive advantage model' (1998), has been highly influential in current understandings of the importance of cultural industries such as music to urban economies. Simply put, it is about a 'geographical agglomeration of firms that enjoy economies (positive externalities) from being located in the same place' (Lorenzen and Frederiksen: 156). Porter's work specialised in how specific places and the industries associated to them generate spillover benefits in three ways: by fostering productivity gains, innovation opportunities and new business formation.

This concept has been widely applied to cultural clusters (also known as districts or quarters) which – except for their product – are said to perform like industrial districts in that they generate the following benefits:

- the reduction of business/transaction costs
- accelerated pace and circulation of capital and information/knowledge (information flows)
- stronger social cohesion/personal contacts (networks of interaction) [Culti: 72].

The success of location and agglomeration is conditioned on the positive externalities that arise from specialization in particular industries and occupations (for example, localized specialist networks; active interrelations of firms, institutions such as conservatoires, and individuals; selection of sub-suppliers; trust; etc.). But their success is also driven by the externalities that arise from the diversity of cities themselves in terms of cultures, industries, workforce and skills (Flew 2010: 86). In London, there is evidence that these key links exist between the arts and creative economy; mainly, that the country's diverse population *and* its traditional art forms such as West End theatre, opera and musicals (which recently enjoyed their seventh consecutive year of rising attendance figures) are together responsible for the continuous and thriving demand for cultural and creative products in the city (Fleming and Erskine 2011: 99).

In the United States, a significant number of studies exist regarding creative industries and cities. Study areas have included Albuquerque, Detroit, Seattle, Georgia, Florida and New York (Zukin 2001; Riall 2011; Beyers et al. 2004; Florida 2004; Currid 2007). Rosemary Scanlon and Catherine Lanier's economic study of the arts industry in New York City and State (2006) is particularly relevant. It identifies spill-over expenditure associated to New York City's cultural activity on business for hotels and restaurants, retail stores and transportation services, advertising, design and publishing, and legal and financial services. Both the commercial and non-profit sectors of the New York arts industry (which are closely related, with talent, product and capital flowing from one to the other) have experienced growth since

the 1990s, especially through Broadway, film productions and arts-motivated tourism. Appendix F offers an overview of how New York City benefits economically from the arts.

In London, the creative industries add between £21 to £25 billion annually to output and outperform all other production industries combined, rivalled only by business services at £32 billion (Knell and Oakley 2007: 7–8). A number of crucial factors make London's creative clustering possible. It is already a centre of financial and professional services *and* arts and entertainment industries, making it an above-average place of consumption of cultural goods and services. But more importantly to the theory of clustering, it attracts communities of 'creative people' (Florida 2005) or 'creative entrepreneurs' who can attract and generate more creative capital. This, in turn, is related to the city's capacity to train that social 'class' through institutions such as conservatoires to advance the creative sectors, create more value and promote further competitiveness (Costa 2008: 192).

Clustering is not only typical of cities but also of musicians within them, who tend to gather in what are described in the literature as 'scenes' (Beyers *et al.* 2004; Clark, Rothfield and Silver 2007). These scenes are:

> Geographical locations which bring together musical and business talent (e.g., agents, managers, taste-makers, gate-keepers, critics, sophisticated consumers) across social networks and physical space (neighbourhoods, communities, clubs, recording studios and venues)…a geographically-delimited market in a microcosm rooted in a specific location (Florida and Jackson 2008: 5).

Like New York City's, London's music industry has a symbiotic relationship with those who supply the goods and services associated with cultural, artistic or creative value (for example, producer service establishments such as lawyers, accountants, consultants, and computer services for management purposes). In addition to New York City, the other United States city where this takes place is Los Angeles, with San Francisco a distant third (Currid 2007).

Studies have identified geographical distributions of musical clusters which include musicians, music organisations and music companies from both the classical and popular music spectrums. Concentrations include the following (Lainh and York 2009: 18):

- Recording companies, studios and publishers concentrated in inner London;
- Manufacturing and distribution in 20 outer London boroughs;
- Four significant clusters of music-business companies in inner London:
    - 153 in W1
    - 139 in Notting Hill
    - 103 in Camden
    - 58 in Chelsea and Fulham.

The City of London is a major funder of the arts in the Square Mile and its fringes. A study it commissioned analysed the area's success as 'an arts cluster' for the period 2004/05[7]. It concluded that the direct, indirect, induced and tourist impact of its festivals and institutions, including the Guildhall School of Music and Drama, the Winter Concert Series, City Music Society and the London Symphony Orchestra, accounted for £325m of value added, attracted 2.5m visitors and employed 3,360 individuals in 2005 (Oxford Economic Forecasting 2006).

[7] For a review of studies of the contribution of the arts to the UK economy from 1988-2001 see Atton et al. (eds) 2008, pp 84–100

London's orchestral sector is an important element of the classical music and session scene. It contributes not only by performing and recording, but many of its members teach the next generation of conservatoire students, thereby linking economic and non-economic aspects of the cluster in a synergistic manner. Economically, this sector has demonstrated stability and growth, moving from deficit in 1999–2000 to surplus and a much improved financial position in 2003–2004. The number of performances of England's 20 or so leading orchestras of various sizes has grown consistently and—with the aid of digital technology—audiences for classical music concerts grew across the board (Fleming and Erskine 2011). The Association of British Orchestras (ABO) has demonstrated that for every pound of public investment made in orchestras, another £2 is generated from other sources, such as private givers (individuals, charitable trusts and businesses) and earned income (ticket sales, commissions, CDs and downloads, international touring and commercial partnerships) (ABO 2011).

As a creative art form where purpose is often informed through connections with audiences, classical music has a particularly important role to play in the 'experience economy' (Scott 2010: 119). Specifically, classical musicians have been leading the way within the digital transformation of audience experience and marketing[8]. While the rapid structural and institutional effects of digitisation have been disruptive to the rest of 'the music industry' broadly understood, the classical music strand seems to have largely resisted this trend, with some even reporting the opposite effect. Some small record labels (Chandos and Hyperion) and in-house labels (The London Symphony and Royal Opera House, Covent Garden) are capturing live performances, and these are very successful (Clements 2009). Theatre broadcasting to live cinemas spearheaded by the National Theatre, and 3D performance broadcasting by the Royal Opera House and English National Opera have also been noted as innovative in the sphere of digitisation, opening the economy of experience to wider audiences (Fleming and Erskine 2011: 55).

London is fortunate in this respect, as classical music is under severe pressure in other places. New York City Opera recently left Lincoln Center after 40 years because of financial problems brought on by diminished attendance and donation levels due to the 2008 financial collapse, and even the Metropolitan Opera has financial problems (Ross 2011). The May 2011 edition of *The New Yorker* also reported strikes, downsizing and salary cuts to the Detroit Symphony, the bankruptcy of the Louisville Symphony and the Philadelphia Orchestra, and the shutting down of the Syracuse and New Mexico Symphonies. An important issue here is how different ways of accessing music can generate the capacity to maintain the quality of performance and cover costs. The Metropolitan Opera now does regular performances which are watched in cinemas across the country for around $20 per person. These are usually sold out and provide significant value added as well as improved financial viability. This type of approach is only possible where the name is world renowned – which suggests a significant potential for London's orchestras and opera to spread 'live performance' which they are only just developing.

[8] For more information about trends in digital music sheet downloading and classical music podcasts and blogs see Robin Houghton's 'Getting technical' in *The British and International Music Yearbook*, 2011.

4. The economic impacts of the three conservatoires

Destinations of graduates

The graduates of the three conservatoires find employment in orchestras, theatre, advertising and other sectors – but overwhelmingly within the music industry. Table 11 shows the initial destinations of RAM graduates for the previous three academic years. It should be stressed that it takes musicians at least three to five years to establish themselves in the profession after they have finished their full-time education. Nevertheless, the table shows that the most likely initial destination was 'employed in profession'—that is, working as musicians, which was the first employment of about a third of postgraduate leavers and also the largest single destination for undergraduate alumni (the figures are slightly skewed by a high level of non-response by undergraduates in the last year of the survey). The second most common destination for undergraduates was further study—suggesting that they too would eventually join the ranks of performing musicians after postgraduate study.

Table 11: Royal Academy of Music destination of 2007–10 leavers (overseas excluded)

	2007/2008				2008/2009				2009/2010			
	UG		PG		UG		PG		UG		PG	
Destination	#	%	#	%	#	%	#	%	#	%	#	%
Teaching	3	7	11	10	4	9	20	18	4	7	15	12
Employed in profession	8	18	45	39	10	23	51	45	8	14	40	32
In other employment	2	4	3	3	1	3	11	10	2	4	4	3
Unemployed	0	0	10	7	3	7	12	11	0	0	0	0
Further study at RAM	6	13	2	2	6	14	4	4	4	7	0	0
Further study elsewhere	12	27	7	6	6	14	6	5	3	5	2	2
No response	14	31	36	32	14	32	37	32	35	62	63	51

Source: RAM

Table 12 gives data on how the 2003 cohort of leavers from the Royal Academy of Music spend their working time. It shows that about two-thirds of their total work time is accounted for by performing, with another 2.4% dedicated to composing. Thus the overwhelming majority of work time goes to the tasks for which the conservatoire trained them This is exceptional in UK higher education. The second-highest use of time was for teaching, an activity that is vital to the maintenance of London's position as a global music centre. The conservatoires' role in wider music teaching is further discussed below.

Out of RCM alumni who graduated in 2010, 100% of those who responded to the survey of leavers reported that they had moved into employment or further study. This result placed the RCM at the very top of the league table produced by the Higher Education Statistics Agency (HESA), which included not just conservatoires but all UK universities.

Table 12: Employment for 2003 cohort of leavers, Royal Academy of Music*

Employment category	Number of individuals	% of total work time*
Performing	123	66.3
Teaching	30	13.2
Composing	7	2.4
Administration	5	5.5
Study	5	4.9
Other	15	6.7
Unemployed	1	0.37

**% and numbers do not strictly correlate because of portfolio careers. Percentage figure calculated on the basis of the time spent by all respondents on one particular area of work*
Source: LSE London calculations based on information provided by Royal Academy of Music

Direct and indirect economic effects of the conservatoires

The *direct* economic impact of the expenditure of the three conservatoires will, to a significant extent, be in the immediate vicinity of their main locations in central London. But some of it will benefit locations across a wider area within the UK. Table 13 shows the residential locations of the RCM's teaching staff, which are unlikely to be radically different from those of the other institutions covered by this study. 57 per cent live within London, with a further 30 per cent in the wider South East and 11 per cent elsewhere in the country. The direct economic impact of the institutions will, to some extent, benefit neighbourhoods well beyond the centre of the capital.

Table 13: Residential locations of teaching staff, Royal College of Music

Area	% of teaching staff resident there
London	57%
South East	30%
Rest of UK	11%
Abroad	2%

Source: RCM

More important, however, than the direct economic effect of the three conservatoires in terms of expenditure and exports is their *indirect* effect on the London and UK music sectors and therefore on their economies. As Chapter 3 makes clear, London is a music 'cluster' not just at national level but on a global scale. Such clusters emerge as a result of self-reinforcing processes of concentration, and are fostered by the existence of the right infrastructure (including conservatoires as well as concert halls, recording studios, instrument vendors, specialist accountants, and so on).

Table 14 provides information about the size of the UK music industry and its various sub-sectors. Where possible we have provided figures specifically for classical music, as the conservatoires concentrate on educating classical performers (though classically-trained musicians make a significant contribution to the pop, studio and cross-over industries, and many famous popular musicians are alumni of the three institutions: for example, Sir Elton John went to RAM, Dido to Guildhall, and Mica and Rick Wakeman to RCM). However, it should be emphasised that is not always possible to distinguish between the various musical genres in the statistics. In addition, the music industry does not fall neatly into the standard

industrial or occupational codes used in official statistics.[9] Overall the music industry employed about 57,000 people in the UK in 2000, of which classical music and music theatre account for about 21,000. Value added attributable to classical music and music theatre was more than £700m per annum.

Table 14: Estimated value added and employment (FTE) for selected elements of the UK music industry, 2000 and 2010

	Value added (£m)			Employment (FTEs) 2000	
	Overall		of which classical and music theatre (B)	Overall	of which classical and music theatre (B)
Category	2000	2010 (A)	2010		
Music recording (including labels, studios and manufacturers)	1,024	1,327	265	10,160	2,032
Composition of musical works & music publishing	448	580	116	4,841	968
Education and training	407	527	105	29,356	5,871
Live performance (classical & music theatre)*	165	214	214	50,530	12,230
Others including other artist earnings	140	181	36		
TOTAL	2,184	2,829	736	94,887	21,101

**Musicians included here rather than being divided amongst other sectors*
Source: LSE London calculations based on Counting the Notes (National Music Council 2002) Table 10:1

(A) 2010 value added calculated by inflating 2000 figures using GDP deflator.
(B) Live performances in classical and music theatre accounted for 20% of all value added for live performance in 2000; this % has been applied to other categories to estimate the figures attributable to classical and music theatre in 2010.

Table 14 shows there were estimated to be 50,000 performing musicians in the UK in 2000. Rather more recent employment figures from the Labour Force Survey confirm this figure. Averaging 2007-9 to reduce sampling error, LFS figures show 35,000 people whose main occupation is 'musician' in the UK, of whom 11,000 are in London. A further 32,000 are employed as 'singers, actors or entertainers', 9,000 in London. Subtracting an estimated 15,000 for 'actors or entertainers' leaves a total of 52,000. This is very close to the 2000 figure.

The three conservatoires together produce approximately 300 graduates per annum; over the course of a 20-year period they will therefore have educated c. 6000 musicians. Even allowing for those who work in other countries or are not professional musicians, this represents a significant proportion of the estimated 52,000 musicians and will include many of the highest-achieving ones. Their work is likely to be fundamental to the entire music

[9] Atton et al. described the Standard Occupational Classification of 'cultural occupations' and industrial divisions representing core 'cultural industries' as limited and outdated, and said it restricted their ability to use appropriate categories for research into cultural occupations and industries in the UK.

sector, on which the other performers also depend. It also reflects the enormous importance of the agglomeration effects of music in London.

The crucial role of the conservatoires in producing high-quality performing musicians is shown by figures demonstrating that employment levels are consistently high for conservatoire graduates. This is particularly true at postgraduate level: postgraduates are more likely to stay in the musical profession and to achieve performing contracts than undergraduates (57% as compared to 28%). In British orchestras, 90% of musicians have first degrees and 40% hold graduate qualifications (HEFCE 1998). The same review found that employment levels for conservatoire alumni are high and that their employers, who now tend to require postgraduate study as a prerequisite, were satisfied.

While live performance is the subsector of the music industry that employs the largest number of individuals, recording produces by far the most value added (Table 15). This includes not only the recording of albums for sale to the public, but also the recording of music for films, video games, advertisements and television. London excels worldwide in this area, largely because the proficiency of its orchestras and musicians means that they need little rehearsal time to produce top-quality work. Music for most Hollywood blockbusters, for example, is recorded in London.

Tables 15 and 16 vividly demonstrate the importance of conservatoires to the major UK orchestras. Table 15 shows that graduates of the Royal Academy of Music made up at least a third of the members of these leading orchestras, and when Table 17 was compiled, more than half of the musicians in surveyed orchestras were educated at the RCM, RAM or Guildhall. According to Table 16, about 17% of these musicians came from universities, but even these university-educated musicians often have a mixed conservatoire/university training, as those educated solely at university are very rarely equipped to follow high-level performance careers.

The conservatoires are a major factor contributing to the success of British orchestras. The total income of British orchestras included in the survey (excluding the BBC orchestras) in 2010 was almost £150m (Association of British Orchestras 2011). The ABO does not represent all British orchestras though it does include most of the best known. Just under 54% of their income came from performances, tours and sales, while 33% came from Arts Council or other public grants, or from local authorities. In 2010 the British orchestras surveyed gave 457 performances in 39 foreign countries, thus contributing to UK exports.

Table 15: Royal Academy of Music alumni as % of orchestra members, 2010

Orchestra	% of members from RAM
Nash Ensemble	58
Orchestra of the Royal Opera House	49
City of London Sinfonia	43
London Symphony Orchestra	35
London Philharmonic Orchestra	34
City of Birmingham Symphony Orchestra	32
Chamber Orchestra of Europe	24

Source: RAM

Table 16: Origins of players in four major London orchestras and contract orchestras, early 2000s

Institution	% of musicians from surveyed orchestras who trained there
Royal College of Music	21.8
Royal Academy of Music	21.4
Royal Northern College of Music	13.5
Guildhall	11.0
Royal Scottish Academy	5.2
Trinity College	3.9
Birmingham Conservatoire	0.8
London College	0.6
Universities	15.7
Overseas	6.2

Source: Musicians' Union Orchestral Research Final Report, quoted in Counting the Notes (National Music Council)

Conservatoire graduates also make up a high percentage of performers in London's West End musicals, both in the orchestras and on stage. Percentage figures are not available, but by way of illustration, over the last few years a single specialist programme (the RAM postgraduate musical theatre course) has seen at least 27 of its graduates take up roles in *Les Misérables* in the West End, 6 in *Mamma Mia,* 23 in *Phantom of the Opera* and 4 in *Sister Act.* This course has been running since 1994, and graduates have been playing leading parts in musicals since then. The advent of reality TV shows such as *How do you solve a problem like Maria?*, in which lead roles are cast by popular vote, may seem to undermine the case for professional training. In fact, however, the competitors are often experienced young professionals: three of the finalists in recent shows (for the roles of Nancy in *Oliver!* and Joseph in *Joseph and the Multi-Coloured Dreamcoat*) were graduates of the RAM course. Other ex-students have gone on to work in musical theatre as writers, composers, musical directors and choreographers.

Through their performance work in orchestras and musicals, these graduates contribute importantly to the success of one of the UK's most lucrative economic sectors: tourism. Some 60% of overseas visitors to London, and 60% of UK staying visitors, said theatre, music and arts performances were 'very important' or 'important' in their decision to visit London (London Visitor Survey 2008).

According to the Society of London Theatre, more than 8 million people attended a musical in London in 2011 and revenues were £329m; this accounted for about 62% of the box office of all London theatre productions, far in excess of the contribution of plays. A further £80m came from other types of performances including opera and dance to which musicians also contribute.

Tables 17 and 18 give estimates of the direct income received by London venues from overseas audiences for musicals, which is by far the largest and most successful sector of London theatre. Something over 14 million overseas visitors came to London in 2009. Surveys suggest that about 17% of visits include a trip to the theatre, and that 64% of these visits are to a musical, giving a total of 1,540,000 overseas visitors attending a musical in London each year. Total ticket sales attributable to these visitors in 2010 were nearly £60m.

Table 17: Tourist visits to theatre: London

Tourist visits	Number	%
Total visits to London by overseas residents (2009)	14,200,000	
Number that included visit to theatre	2,400,000	17% of visits to London
of which musical theatre	1,540,000	64% of theatre visits
of which opera	24,000	1% of theatre visits

Source: 'Visitors from Overseas to London's Theatre', Visit Britain 2010; Society of London Theatre

Table 18: Overseas visitor proportion of London musical theatre spend (2010)

London theatre statistics	Audiences	% of above	Ticket sales
All attendance at London theatre 2010	14,152,230		£512,331,808
of which attendance at musicals	8,423,430	60	£324,357,255
of which overseas (from Table 16, above)	1,540,000	18.3	
Total musical sales attributable to overseas visitors			£59,357,378

Source: 'Visitors from Overseas to London's Theatre', Visit Britain 2010; Society of London Theatre

Table 19 presents similar calculations for classical music, albeit based on less robust data. According to recent statistics, something over 4 million people attended classical music concerts, the opera and/or ballet in the UK last year. Ten years ago the Royal Festival Hall, a major classical avenue, reported that 10–15% of its audience was from overseas (Trew 2001). Applying the lower end of this estimate to all attendees suggests that about 400,000 audience members were from overseas. According to Audiences London the average cost of an orchestral ticket in 2009/10 was £19.31, suggesting that total direct income from this source is over £8 million per annum. Studies of cultural visitors to New York City suggest that they stay longer than typical visitors and spend more money (Scanlon and Lanier 2006).

Table 19: Income from overseas visitors: classical music events

Category	Number	Ticket sales
Total number of attendees at UK classical concerts, opera and ballet	4,181,944	
Estimated 10% from overseas	418,194	
Ticket sales to overseas audience members at £19.31/ticket		£8,075,326

Source: LSE London calculations based on figures in Foresight, Issue 87, January 2011; 'Tourism and the Performing Arts' quoting 1996 BTA survey; ABO Key Facts 2011; Audiences London figure for average ticket price for orchestral event 2009/10

In summary, the conservatoires have a direct economic impact in that they successfully prepare their students for work in their profession and are major employers of London's top instrumentalists, singers and composers. Their indirect impact is much more important: they

provide trained performers for all types of classical, musical theatre, jazz and opera groups in London and the UK. Their performances generate ticket sales and attract overseas tourists. And we estimate that these tourists are responsible for about £60 million in ticket sales per annum for West End musicals and orchestral concerts. Other sectors of the UK music economy also benefit from the presence of the conservatoires. Overall value added in the music industry in 2010 was over £2.5 billion, and for classical music and musical theatre the figure was over £700 million. In this context the £5 million spent on exceptional funding for the conservatoires represents good value.

5. The wider purposes of the conservatoires

The social value of education and arts

> Socially, it can be argued that education and arts have a civilising effect on the population at large and that they are instrumental in raising the quality of a society's political and social life through their effect on social cohesion, improving the ability of the population to make reasoned decisions, respect law and order, and form common social goals. (Towse 1993: 182)

Culture-based creativity is not just an essential component of a thriving, innovative and competitive post-industrial economy (Chapter 3). There are also a number of strong cases to be made for the meaning and extent of social values embedded in arts and culture:

1. Culture has a positive impact on citizen engagement and pro-social behaviour;
2. Culture fosters social capital that can combat isolation, build social networks and inclusion and even encourage trust in parliament and legal systems (Landry 1993; Lingayah 1996);
3. Culture provides a source of reflection, morals and social criticism, and of people's and society's assertion of identity, diversity, creativity and participation (European Task Force Report 1997);
4. Culture improves intellectual and life-long skills, including perception and language, literacy and numeracy, creativity, health and general well-being (Hallam 2010).

By 'promoting critical reflection, innovation, and the ability to question orthodoxies' (KEA 2009: 7), quality creative arts education has a crucial role to play in enabling the social maxims outlined above. Music and the arts are cross-over disciplines that are generally believed to support achievement in all subjects.

In this section we discuss some of the wider social and cultural benefits of top-quality music education to London and the UK. We address the conservatoires' role as producers of music teachers and repositories of top students, and discuss their outreach programmes, teasing out their extent and relevance. We suggest that its breadth and depth help to bridge the gap between different social sectors and expose people of all ages to musical experiences.

The conservatoires and teaching

The conservatoires contribute to teaching because their graduates go on to work as teachers of music themselves, often as one element of a 'portfolio career' (Mills 2004a and b). In addition, the conservatoires provide the pools of top-quality students to whom the world's best musicians can pass on their skills and knowledge, either through regular teaching or through giving masterclasses.

One of the main ways that conservatoire students' employability is being addressed is through practical work-study provision and teaching course programmes. Conservatoire provision in this area has improved massively over the last 20 years. Underlining the fact that not all professional musicians are adequately trained as music educators or do not have sufficient understanding of teaching and learning, the recently released 'Music Education in England

Review' (known as 'the Henley Review' 2010) responds directly to this issue by recommending that a new qualification be developed and awarded to undergraduate music students as educators and that 'conservatoires should be recognised as playing a greater part in the development of a performance-led Music Education workforce of the future' (Henley 2010). The Greater London Authority advocates greater collaboration between conservatoires, training centres and music services as a way of achieving an improved system of initial teacher training (GLA 2010).

The Henley Review suggests that conservatoire-trained musicians teach for two years before embarking on a performance career, and that they could do so through an expansion of the Teach First scheme. The conservatoires argue strongly that they already give their students the opportunity to teach and some training as music educators through existing components on their courses. Given the high degree of dedication and focus required to succeed in music, they express concern that if students followed the advice of devoting the first two years of their post-HE career to teaching, their potential to launch a significant career in performance and/or composition would be fatally compromised.

The links between education and employment training are also reflected in the policy statements of the Arts Council's report Supporting Growth for the Arts Economy, which says:

> Our education infrastructure is increasingly geared to nurturing creative entrepreneurs and pioneers across many different disciplines, continuous professional development is increasingly enshrined as a core business for excellence in the arts, and bespoke skills development for the creative economy is more relevant and achievable than ever. (Felming and Erskine 2011: 85)

As Table 20 indicates, the overwhelming majority of teaching staff at the three conservatoires also teach or perform elsewhere, thus contributing more broadly to the musical life of London. Many are members of top London orchestras and teach at the conservatoires, and many combine teaching at the conservatoires with private tuition or lessons at other schools.

Table 20: The conservatoires and teaching

Category	Number	%
Teaching staff at RAM, Guildhall and RCM	1,082	
of which those who also perform and/or teach elsewhere	1,028	95

Source: RAM, Guildhall, RCM

Table 21 demonstrates the importance of teaching in the 'portfolio careers' that characterise the classical music sector. About one in ten of RAM alumni – both recent and from 8 years ago – are teaching as their main employment, and more than 40% of recent Guildhall music graduates do at least some teaching. This is indicative of the ways in which the music profession more broadly benefits from the expertise concentrated in the conservatoires.

Table 21: Conservatoire graduates and teaching

	% teaching as main employment	% doing some teaching
RAM graduate and postgraduate leavers (2009/10)	11	n/a
RAM alumni (2003 cohort)	13	n/a
Guildhall recent alumni	n/a	41
RCM graduate and postgraduate leavers (2009/10)	n/a	26

Source: RAM, LSE London calculations from Guildhall figures.

As musicians move through their careers the percentage of time spent teaching tends to increase. Table 22 shows the percentage of working time spent teaching for alumni of the Royal College of Music, by the decade of matriculation. The most recent cohort represented in the table spent less than 30% of their working time teaching, while for the oldest group it was over 40%. These alumni therefore represent a significant resource of teachers at the highest level.

Table 22: Percentage of working time spent teaching: Royal College of Music alumni by decade of matriculation

Decade of matriculation	% of working time spent teaching
Up to 1970	40.2
1971–1980	30.8
1981–1990	35.0
1991 and after	27.8

Source: RCM

The conservatoires serve as an important avenue for top artists to pass on their knowledge. They are staffed by renowned composers, vocal and instrumental soloists and senior musicians from London orchestras; in addition they host a large number of master classes in all musical disciplines and instruments, given by London and UK experts but also by international professionals who are performing in London. Appendix C gives a list of some of the recent and upcoming teachers of master classes at the three conservatoires, to give a flavour of the breadth of disciplines and artists involved.

Outreach: the role of the Junior Conservatoires

All three colleges have 'Junior Conservatoires' or 'Junior Academies' which run all day on a Saturday and draw in students from a wide area across the UK, with ages ranging from 4–18 (Guildhall) to 8–18 (RAM, RCM). Curricula include individual instrumental and/or vocal lessons, ensembles, and choirs. The ultimate goal of these activities is to prepare students for entry into a music conservatoire or other music department in a higher education institution upon completion.

The RAM's Junior Academy opens opportunities to talented young musicians by training children of all backgrounds at both primary and secondary levels. It has partnerships with organisations that represent traditionally low-participation groups, such as Kuumba Youth Music, which targets BAME youth, and Music First in Islington. The Junior Guildhall programme includes a vast amount of London-based and external performances, holding over 80 concerts a year with students, giving them the opportunity to record for television and radio and even to tour abroad. The RCM has an additional programme called 'Sparks Juniors' that provides a route towards entering the Junior Department to ten students with

exceptional potential per year, from Year 4. Outcomes in this programme include participation in borough orchestras, local authority functions, RCM's youth choir, and fee-free Junior Department auditions.

Table 23: Junior conservatoire fees

Institution	Fees per annum (2011/12)
Royal Academy of Music	Junior Academy: £3,033 Primary Academy £1,710
Royal College of Music	£3,186
Guildhall School of Music & Drama	£2,650

Source: RAM, RCM and Guildhall webpages

There is competition for the places in these pre-HE departments and selection is by audition. Whilst no formal standards are given, apart from the expectation that the children will show musical potential, RAM suggests that there would be an expectation that a child would have achieved Grade 5 with distinction in their main instrument by age 11 and Guildhall states grade 5 by age 10 and Grade 8 by 16. Most would also be expected to play a second instrument to a high level.

Fees vary between conservatoires (Table 23) but in no case do they cover the full cost of provision. The three institutions all offer bursaries or scholarships. By offering this financial assistance on a competitive basis (and at varying levels) their main purpose is to provide wider access to high-quality music education for talented and promising individuals who could not afford to go otherwise.

Table 24 below demonstrates that this funding does lead beneficiaries to further musical education. Of those who received bursaries at RCM since 2005, 75–100% progressed to higher education (conservatoires and universities). Older data echo these findings, showing that on average 70% of those who move on to higher education institutions from the junior conservatoires go on to study at HE level in a conservatoire (HEFCE 2002: 206).

Table 24: Progression to higher education among RCM Junior Department bursary holders

Year	No. of leavers from Yr 13	of which supported by bursary	Bursary holders progressing to HE		Destinations of bursary holders	
			Number	%	Conservatoire	University (of which studying music)
09/10	51	12	9	75	2	7 (4)
08/09	49	13	12	92	4	8 (2)
07/08	55	9	7	78	4	3 (2)
06/07	48	11	11	100	3	8 (5)
05/06	42	12	11	92	7	4 (4)

Source: RCM Access Agreement for 2012/13

Nevertheless, this assistance does not resolve the issue of additional costs for parents such as the instruments and music lessons children require in order to achieve the necessary standards. RCM interviewees said they are exploring ways of broadening the role of the Junior Department to bring in younger children with less formal training. Some of the interviewees of this project, however, argued strongly for maintaining the current approach towards developing excellence.

Other outreach initiatives

Besides the Junior Conservatoires, the institutions carry out a variety of other outreach activities. Most visibly, they all have an extensive and diverse programme of public performances year-round. These not only enhance the city's musical offering, but they provide a learning opportunity from the perspective of career portfolios. The students and ensembles contribute to and play in London's musical events, and the institutions also contribute to other significant city projects and festivals and host their own festivals that attract national and international visitors.

The conservatoires also work with the public at large and with schools, mainly in the maintained sector. Their outreach activities demonstrate clustering in action: how active networks and alliances forged between various sectors, institutions and individuals in London's music and arts scene can increase levels of human, social and cultural capital. Further details of outreach activities are given in Appendix G.

Royal Academy of Music

RAM has established various levels of active collaboration with other academic and public institutions in London and beyond, developing ties to the wider community, enhancing student experiences and increasing their future professional prospects. The best example of this is RAM's 'Open Academy' outreach programme, which is supported by compulsory 'Music in the Community' courses at undergraduate and postgraduate levels. In 2010/11 there were 28 Open Academy projects, involving the participation of 168 Academy students and 1460 members of the public. These ranged from projects at Great Ormond Street Hospital and Resonate (for people diagnosed with dementia) to collaborative work in 22 schools in the

boroughs of Westminster, Camden, Tower Hamlets, Southwark and Lambeth. The ages of participants ranged between 3 and 90+, with the largest group (64%) in the range of 5–12 years. Some 53% of participants were of Asian, black or mixed ethnicity. These projects complement the work of the Junior Academy with organisations such as Kuumba Youth Music (initially from East London, now spreading throughout the capital), First Music in Islington and Tomorrow's Warriors. These collaborations reach over 600 young musicians annually.

Academy students give performances at Music Festivals throughout London and the UK. In London they perform regularly at the South Bank Centre, the Wigmore Hall, Kings Place, the Spitalfields Festival, and the BBC Proms. Further afield, they have appeared at the Aldeburgh, Kings Lynn and Bath Festivals.

The Academy's Museum, which is open six days a week, provides another key link to the local, national and international community. It holds world-renowned collections of musical instruments and scores, and hosts a full calendar of exhibitions, lectures and events attended by students, educational groups, families and members of the general public. Virtual access to the Academy's collections is available via its website. Academy students participate in events elsewhere within the UK museum sector. In 2010/11 this included performances at the British Museum, the National Portrait Gallery, and the British Film Institute.

Guildhall School of Music & Drama

The 'Guildhall Connect' Programme is a participatory community music-making project which links people, organisations and culture from London, the UK, and internationally to engage in music-making and performing experiences. Appendix G provides an overview of its most recent incarnation as Connect II. Some of Connect's projects include:

- MAP/making: a collaboration with the Royal College of Art aimed at developing new landscapes in music, art and performance;

- Centre for Young Musicians: high-level training for students from all of London's boroughs (principally from schools in the maintained sector), particularly at its Saturday centre;

- Globetown Schools: a decade-old creative partnership for music composition and performance between postgraduates and over 300 Bethnal Green school students;

- Blah Blah Blah Sessions: a composition, performance and live music-making project involving Guildhall musicians and children in care, with opportunities for participants to be future peer leaders of the programme; and

- Hospital projects: a partnership with Barts University College and Whipps Cross Hospitals providing an opportunity for patients to engage in performance and music-making workshops.

One of Connect's collaborative programmes is the Creative Learning Division, formed in 2009 with the Barbican Education Department to offer individuals of all ages and abilities the opportunity to experience the performing and visual arts in various formats. Participants may attend (and help create) concerts, workshops, performances, site-specific events, exhibitions and festivals. They engage with a range of art forms in partnership with formal and non-formal arts organisations and share results of projects amongst each other and with

larger audiences. These paths can lead participants to more formal education, as well as offering a continuous cycle of lifelong learning and personal development. The recently launched Shift Programme, funded by the Paul Hamlyn Foundation, is particularly focused on developing the leadership and collaborative skills of artists working in participatory settings.

The Guildhall's forthcoming LINK programme will be inaugurated in 2013 with the opening of a new Guildhall School building. It was developed in collaboration with the Barbican Centre and the London Symphony Orchestra as a response to a lack of planning between arts organisations. This venture is unique in that it will offer 'an impressive template for what might happen at a national scale—the idea is that working together, these mighty arts institutions can offer pathways into music for all age groups in all East London schools' (Morrison 2011).

Royal College of Music

RCM Sparks is the Royal College of Music's learning and participation programme, which was established as a brand in 2007. It provides opportunities for everyone to make or learn about music at the RCM, regardless of musical ability. The programme provides a range of activities including weekend workshops for children, holiday courses for teenagers, vocal days for families and opera matinees for schools. Their goal is to break down barriers, real or perceived, and unlock musical opportunity to those who otherwise would have little or no experience of live music.

Complementing the college's mission to provide professional training at the highest international level, RCM Sparks provides specially tailored training for RCM students and graduates, preparing them for the diverse roles they will undertake as professionals. It aims to enrich participating student's individual musicianship and professional skills, cultivate their awareness of social responsibility and improve their long-term employability. Guided by experienced professional animateurs, RCM students take part in a wide range of activities with schools and community groups; about 20% of students, plus many graduates, are involved. They perform, compose, teach, coach and mentor, with the goal of spreading the joy of music, inspiring creativity and encouraging life-long learning.

RCM Sparks runs more than 15 different types of projects in three main areas: in the community, in schools and in partnership. Partners range from local nurseries and schools to community music projects and internationally renowned organisations such as the Royal Albert Hall, BBC Proms and English Chamber Orchestra. In 2010-11 Sparks worked with almost 4000 schoolchildren and members of the community, over 2700 of whom had not previously had contact with the RCM.

Some 60% of places at Sparks community workshops are free, and the programme actively recruits children from low socio-economic (LSE) backgrounds to ensure that they can take part regardless of means. Sparks Juniors, an intensive instrumental scheme run as part of the RCM Junior Department, recruits 10 children each year for a three-year programme. About 80% of those accepted are from LSE backgrounds, have English as a second language or have a special learning need.

Sparks' flagship programme Musicians of the Future (MoF) is run in partnership with the Royal Borough of Kensington and Chelsea, where the college is based. Since its launch in 2005 MoF has achieved the following:

- 120 local children have learned an instrument over a sustained period of time
- Over 800 children have learned an instrument through the Wider Opportunities MoF programme, led by RCM musicians and RBKC class teachers
- More than 3700 children have attended a Musicians of the Future concert given by RCM students and MoF instrumentalists
- Two borough orchestras have been created in partnership with RBKC

The RCM works with more than 40 state schools in other local authority areas to improve musical learning and achievement. It also has academic partnerships with other specialist institutions such as Northampton Academy, Malcolm Arnold Academy, and the new Hammersmith Academy, which has specialisms in creative and digital media and IT.

RCM has a Museum of Instruments with a series of public lectures, events seminars, recitals, demonstrations and exhibitions. Its collection contains thousands of musical instruments and accessories, and it offers important resources for research. RCM also offers a regular, mainly free annual programme of student-generated performances, as well as popular concerts and opera productions.

Conclusions

Reports and studies have found that outreach work makes music more widely accessible. Young audiences must be captured early in order to ensure lifelong music exposure and education. The DCMS 2004 'Music Manifesto' expressed its commitment to these sorts of outreach activities. Many of the people interviewed for this project saw the outreach work carried out by the conservatoires as an important way of strengthening music teaching in maintained sector schools, but felt it was not necessarily sufficient to provide the framework and opportunities to bring on a new generation of musicians. One artistic agent, for example, felt that the expectation that outreach work should be with the maintained sector meant that potential links with some of the independent schools with outstanding music departments were not developed.

The programmes described above are not a gesture geared towards some vague notion of Corporate Social Responsibility. They are an expression of recognition by these conservatoires that their expertise, resources and prestige exist not only for their more natural audiences, but also as a resource for the wider community of all ages. Most importantly, and as their Junior Colleges demonstrate, they act upon the belief that children should have access to a high quality foundation in music experiences and studies, thereby contributing to DCMS's stated goals of inspiring 'a new generation of creative, culturally aware and culturally active individuals, giving people the chance to experience the power of culture at an early age' (DCMS 2004).

Moreover, their various partnerships described go some way to meeting the aspirations of the Music Manifesto for forging stronger links across sectors to help students enter work with the skills needed to thrive personally and professionally (DCMS 2004). Finally, the efforts made by all three conservatoires towards professional skills training allow alumni to work as well-rounded musicians, teachers and leaders, which is consistent with the recommendations of the Henley Review.

6. Findings from interviews

> [I] also want our cultural organisations to be seen as part of our creative industries. When we talk about the creative industries I don't just want to talk about video games, or advertising, or fashion. I want to talk about museums and the performing arts. Arts organisations are a fundamental part of the creative industries, and of our future growth. Driving technological change, educating and training new creative talent or developing the content that we're known for around the world.
> (Ed Vaizey, Minister for Culture, Communications and Creative Industries, Culture of Change speech, January 2011)

> Il faut apprendre à juger une société à ses bruits, à son art, à ses fêtes plus qu'à ses statistiques.
> (Jacques Attali)

Interviews were conducted with a number of key participants in the music industry in order to understand better the existing and potential impact of conservatoire education in London. A list of interviewees is given in Appendix G. They are not quoted here by name.

There was a widespread feeling amongst interviewees that the three conservatoires are achieving and maintaining a high quality of musical education. They produce students who are able to perform at a high level and pursue a musical career in many cases at an international level. A number noted that there had been considerable changes over the last two decades in the approach taken by the conservatoires and in the curriculum content. In particular, the curriculum had broadened in response to changing career paths, the requirements to teach and perform a wider repertoire, increased performance opportunities, and the presence of significantly more overseas students (EU and non-EU), particularly at post-graduate level.

Despite other changes, the one-to-one teaching model remains a key aspect of their delivery. There was a uniform view amongst interviewees that this is an essential aspect of the conservatoires' role. The opportunity for students to work intensively on understanding their instrument and developing their talent/playing/performance by learning directly from a 'master' was felt to be essential in developing and achieving excellence. As one interviewee commented,

> In Higher Education one way of addressing funding cuts is to up the student/teacher ratio but in the conservatoires there is simply no way round it – if they are forced to dilute their offer they won't be able to compete.

There was, however, less uniformity of opinion on the breadth of musical focus. Some interviewees felt that a student's time at a conservatoire should be essentially a period devoted to developing understanding of the instrument, of deep training in technique and repertoire and extensive practice time; of notching up a large chunk of the 10,000 hours practice advocated by Richard Sennett as necessary in order to become a musician. But there was also a view expressed that this should also be accompanied by an opening out of perspective to include a greater contextualization and a broader understanding of the role of music in society, together with a focus on enabling students to articulate this and communicate more effectively with the wider world (as exemplified in the conservatoires' respective outreach programmes—see Chapter 5). Inevitably individual interviewees had their own perceptions of how the conservatoires could be [and are] doing this but essentially

much of the debate focused on the tension between addressing the needs of the few versus the many, or put another way, 'the stars versus the run of the mill'.

One interviewee described the position as follows:

> There is a wide range of students going in. At the bottom level there are people who may get into the profession but will never be high flyers. There will also be a large number who reach an excellent standard but are not good enough to be represented by an agent. In any year there are a few at the top who are the stars.

In his opinion all the colleges are getting better at looking after the real stars and allowing them to remain students while simultaneously building an international career.

The breadth of the curriculum, particularly of the repertoire taught, is another subject where interviewees were divided. The following comments from senior musicians and arts administrators sum up the debate:

> A lot of teaching is still of SOLOISTS—most instrumental and operatic students are trained to be soloists. Chamber music performance, orchestral performance and singing in chorus could be spotlit more, so that people who do not 'make it' as soloists feel less compromised.
>
> In general the teaching is geared towards preparing musicians to play a solid repertoire of solo and chamber music but not an orchestral repertoire. To play successfully with an orchestra a student needs far greater emphasis on the standard orchestral repertoire.
>
> We are not looking to produce rank and file string fodder.
>
> Conservatoires should move beyond their traditional role of conserving tradition and become centres of innovation. This is a massive untapped area which is currently largely happening out in the profession.

Many interviewees noted that what might have been a natural progression from student to performer twenty years ago had now become more of a minority route, with the majority taking on a portfolio career. The breadth of activities involved in a typical portfolio career is clearly described by musicians responding to questions about their work in the 2003 report 'Creating a Land with Music':

> The most common portfolio [described] was a combination of performing and teaching or tutoring. Others have developed a portfolio approach in terms of working with or in a range of skills, groups or ensembles, musical genres and traditions, and/or music venues and other locations, such as schools, care centres, hospitals, prisons. Only a small minority of respondents held a regular or permanent post with a single orchestra or ensemble. (HEFCE 2006)

No one interviewed doubted that the conservatoires are addressing this change and providing both a wide range of opportunities and support for contemporary students, or as one interviewee expressed it 'introducing the cold shower of reality - giving them the tools they require beyond playing well and the skills to make a career happen.' The concern expressed was more about the appropriate emphasis and balance within an institution: how to maintain a reputation at an international level as a centre of excellence to attract and train the 'big names' of tomorrow, whilst at the same time managing the expectations of the majority and preparing them for a very different outcome. Evidence about the destinations of leavers in

recent years (Chapter 4) suggests that the conservatoires have been successful at training both high-flying soloists and professionals with portfolio careers.

A corollary to this is the conservatoires' ability to attract teachers of the highest quality. Many students, particularly the most able, decide where to study based on the presence of a particular teacher. Students are attracted to a college by the 'names' on its teaching staff. A top player teaching one-to-one or even regular master classes can be enough to hold a particular department in very high regard internationally. The importance of this was emphasized by an artists' agent who argued that 'the crucial thing for the colleges is to view their professors list as I view my artists list and to recognise that they [the colleges] are in competition'.

Some of these teachers will be former players, now no longer performing but committed to teaching, however, most of the professors are also performers and it is clearly prestigious for the top London orchestras to publicise how many of their lead players have teaching positions – see, for example, the LPO website http://www.lpo.co.uk/about/whos_who_teaching.html. Where players are under contract to an orchestra, the same principle applies and time is made available to top players to undertake other activities including teaching which is seen as prestigious for both player and orchestra. All the top London orchestras also have programmes where they collaborate with the conservatoires in a wide variety of different ways providing opportunities for players, composers, singers and conductors. Artists' agents noted that top international soloists will frequently make time in their schedule to give a master class for conservatoire students and that this is not simply a one-way transaction but also professionally beneficial.

The symbiotic nature of the links between the conservatoires and other areas of the music industry was noted by most interviewees. Many former students are now in relatively senior positions within the industry and it was noted that the conservatoires have become more adept at forging links with their graduates. But the nature of the relationship is more complex than this. In the relatively tightly defined world of classical music, the growing international standing of the major British orchestras is in itself a draw to students both British and international, as coming to study in London means they will have the opportunity to be taught by a player or to work with the orchestra in a collaborative project. At the same time the orchestras are able to identify particularly strong departments within a conservatoire or individual players with talent, and to look for opportunities to work with them. Artists agents may talk to students at the conservatoires about the nature of their representation and developing performing careers but may also be asked to judge student performances in prestigious end-of-year competitions.

Amongst some interviewees there was a perception that whilst the conservatoires had in general established very good and mutually beneficial links with the performing side of the music industry, more could be done both to introduce students to and then strengthen their own links with the broader area of arts administration. As noted above, there is a general recognition of the inherent tension between the role of the conservatoires in training students to perform at the highest level and the reality of life for many graduates, who in practice will end up with a portfolio career. Even those who are mainly performers, it was argued, need to recognise the importance of production and programming, understand what audiences want/are looking for and develop an ability to communicate with a variety of audiences. All those talked to in the broader area of arts administration felt there were opportunities for greater collaboration with the conservatoires. They frequently recognised that they themselves could be more pro-active, but observed that in some cases they were hampered by not knowing the best route to take a project forward within a college.

Some relatively recent initiatives taken by individual conservatoires to collaborate in a wider range of musical activities were applauded. These included involvement with professionally organised music festivals or programmes and the commissioning of new music for student performance from internationally famous composers. Apart from the obvious benefits, these types of developments were perceived as helping to engage students in the whole cycle of performance from creation to production and, equally important, to raise the profile of the conservatoire. On this latter point one interviewee felt particularly strongly that the conservatoires had surprisingly few 'friends in high places' and could be doing more to cultivate their connections, perhaps especially at board level.

A key message which was expressed by the majority of interviewees was the importance of London's position as an international centre for music. Comparisons were drawn with other European and North American cities (for example, Berlin, Vienna, Paris, Moscow and New York) all of which demonstrate particular qualities and strengths, but London was perceived to have a broader range of musical activities and styles, which in turn has generated a stronger base of associated activities such as music publishing, agents, recording studios and so on.

The presence of several top-ranking conservatoires also gives London a greater concentration of musical education than any other world city. As noted in Chapter 5 above, the students at all of the conservatoires put on a large number of performances and as one orchestral interviewee noted 'the presence of the conservatoires in London allows us to constantly refresh what we're doing by working with the next generation'. In the view of some interviewees the inevitable competition between institutions has in turn helped to strengthen their individual identities and to ratchet up the quality of their provision.

Several interviewees noted that London's conservatoires consistently produce students who are quick witted, extremely competent and have 'phenomenal sight-reading abilities'. Largely because of this, London is one of the world's main centres for the recording of music for film, television, advertisements and video games. As one interviewee succinctly put it,

> They could go to an Albanian orchestra who would charge very little but would need hours of [paid] rehearsal time or come to a London orchestra who would more or less play the piece straight through.

The breadth of London's overall cultural offer, not just music, has helped to make London and its conservatoires increasingly attractive to international students. Statistics provided by the conservatoires (see Table 2) indicate that at postgraduate level nearly a third of all students are non-EU international. Further information provided by the institutions in interview suggests that in any year there are between 50 and 60 nationalities represented within each conservatoire.

The multicultural nature of London attracts students from overseas, as does the willingness of British orchestras to recruit from a wider international pool than many other orchestras in Europe and the US. But perhaps of greatest importance, London's range of opportunities for performance, employment and networking is as much a draw for students from Europe and other parts of the UK as for international students.

Nationally and internationally, the brand names and reputations of each of the conservatoires reflect their accumulated intellectual capital and represent considerable value. Interviewees

agreed that the individual conservatoires had been successful in creating and maintaining this level of international recognition but said they could not afford to rest on their laurels and will need to constantly keep the brand real. As more money becomes available in other countries they will need to continue to invest in attracting both the best teachers and students.

A number of interviewees touched on the wider benefits to both London and the UK of the conservatoires as centres of creative learning, promoting an educational framework which allows students to develop their powers of critical reflection, challenge received wisdom and practice, explore innovative interpretations and techniques and create new work. Many interviewees stressed the value of the conservatoires as centres of excellence, and said they were essential components of the vibrant music/cultural industry of London and the UK. The analogy with a pyramid was drawn more than once – if the base is damaged in any way the structure starts to crumble.

Summary of interview findings

The interviewees were influential and accomplished people in the music industry. Their views therefore represented well-informed opinion rather than more general public attitudes. They were broadly in agreement on many topics. They felt that the conservatoires were doing a good job at educating their students to be performing artists, and supported their focus on one-to-one tuition. There was less agreement about whether the conservatoires should focus narrowly on developing performing expertise, or broaden the curriculum to encompass teaching and arts administration. Similarly, some interviewees applauded the conservatoires' outreach work, while others thought they were in danger of losing their focus on excellence. Interviewees agreed, though, that most musicians now can expect to have a portfolio career.

The importance of high-quality teaching was stressed: often students are attracted to a conservatoire by the presence of a particular teacher. For top-quality musicians they offer a valuable and prestigious opportunity to supplement their performing by giving regular tuition or masterclasses. The interviewees emphasised the importance of the links between the conservatoires and the rest of the performing music sector, although some thought they could improve links to arts administration.

The interviewees felt that the conservatoires' presence benefits London. The city has a higher concentration of music education than any other world city, and the presence of a number of institutions creates competition and improves quality. It was felt that they were a fundamental component of London's musical scene.

7. Conclusions

The conservatoires studied have large direct and indirect economic impacts in London and the UK. Their alumni (and their teachers) perform across the country; these performances generate ticket sales and attract overseas tourists. Tourists are responsible for about £60 million in ticket sales per annum for West End musicals and orchestral concerts. Other sectors of the UK music economy also have a symbiotic relationship with the conservatoires. Overall value added in the music industry in 2010 was over £2.5 billion, and for classical music and musical theatre the figure was over £700 million. By comparison, the £5 million spent on exceptional funding for the conservatoires is a relatively small sum.

London is unique in having several conservatoires of international calibre. They provide a source of trained musicians not only for London and UK orchestras but also for a less visible but much larger hinterland of musical activity. Although their focus is on training performing artists, many of their graduates also teach – often combining performing at a high level with teaching in a 'portfolio career' model. And the conservatoires provide an avenue for the world's best musicians to pass on their skills to the next generation of artists.

The three conservatoires analysed in this report represent a small, unique, segment of Britain's higher education sector. They operate in the centre of Europe's largest city, within an economy that has grown to depend increasingly on modern service industries. Their students represent less than one per cent of all those in higher education in London, yet the impacts of the conservatoires' trained graduates can be seen in the West End theatre, classical music, jazz, teaching and in many areas of the country's creative cluster of industries.

London's music conservatoires are one of the key factors contributing to London's place at the pinnacle of classical music performance worldwide. London represents probably the world's largest classical music agglomeration. This achievement is a good starting point for an economy that now needs to re-balance itself away from sectors that have dominated it in recent decades. Economists and other scholars have increasingly focused in recent years on the benefits – economic and otherwise – of such creative agglomerations. London's massive agglomeration of interrelated economic activities, has led to productivity gains that would not be present if the concentration were reduced. For example, millions of visitors to London cite the West End theatre as an important element of what attracted them to Britain. The commercial theatre is a major export-earner for the country. The existence of the conservatoires means that their students can contribute to the continuing success of this successful and expanding part of the country's economy.

This report has examined the many studies undertaken in Britain and overseas into the economic impact of the creative industries and the agglomeration benefits that they generate in major cities. It is worth noting that despite a large literature on the subject, it has proved hard to quantify and value the degree to which individual elements contribute to the productive success of the whole. The conservatoires have something of a problem in providing a quantitative case about their economic impact. Because of data problems and the general difficulty of proving the precise links between one industry or sector and another, it is hard to show how the investment in these institutions contributes directly to UK and London GDP. Nevertheless, the literature is unambiguous that there are benefits to the concentration of related sectors and sub-sectors within urban areas.

Estimates of the economic impact of the music industry suggest it is a significant contributor to the wider creative economy. While it is possible that trained musicians from elsewhere in the UK or from other countries could fill the jobs available in Britain, it is highly unlikely the sector would be anything like as successful if such talent had to be imported.

The conservatoires can be seen as relatively expensive institutions. This is partly a result of their one-to-one teaching method, which is standard practice for music colleges worldwide. There is often little alternative to such a teaching style. In each college the number of students studying each instrument is governed by the requirement to have the right balance of instruments to make up orchestras, jazz groups, opera and musical theatre casts, etc. Only a handful of students may study some instruments, yet each needs specialist tuition. The conservatoires are not alone in requiring extra resources: medicine and veterinary training, for example, are also expensive. But there the link between high investment costs and outputs is accepted with little question: few would disagree that society should invest in training providers of excellent medical care. For the conservatoires it is undoubtedly more of a challenge to make this case. Classical music may be seen as an expensive luxury rather than a necessity. But quite apart from its intrinsic social and cultural benefits, music contributes importantly to the UK economy, and the link between music education and the various creative sectors of the UK economy is clear.

The three conservatoires also represent an important resource for the education of London children, especially in an atmosphere of extreme pressure on local authority budgets. Interviews conducted for this study suggested that music teaching in maintained schools is in decline. The conservatoires' education and outreach programmes reach children in maintained-sector schools who might otherwise lack any experience of music education.

In summary, the three conservatoires examined in this report constitute a set of niche institutions that contribute directly and indirectly to the economy of London and the UK as a whole. They are at the core of a complex agglomeration of creative and cultural industries that itself constitutes a major element in the wider economy. Although the institutions' costs can be seen as relatively high, they are contributing to the success of a part of the economy which is growing and aspirational. Looking ahead at a time when there is little certainty about the robustness of economic output in Britain and other developed countries, the existing modest investment in the conservatoires provides a strong base for sustained expansion in a sector with the potential to develop further in the years to come.

Appendix A: Categories of exceptional expenditure

A1. Royal Academy of Music categories of exceptional expenditure

Expenditure type	% of exceptional cost
Specialist coaching/classes	35
Individual teaching	33
Orchestral support	7
Auditions/examinations	7
Specialist infrastructure/support	6
Instrument maintenance & insurances	5
Specialist library	5
Masterclasses	2

Source: RAM REFI; LSE London categorisation

A2. Guildhall categories of exceptional expenditure

Expenditure type	% of exceptional cost
Hourly-paid practitioners	33
Specialist accommodation	21
Professional fees	16
Staff:student ratio	11
Technical support	3
Outreach	3
Piano maintenance	2
Overheads	2
Production and venue hire	2
HR	2
Auditions	1
Venue management	1
Promotion and management	1

Source: Guildhall REFI; LSE London categorisation

A3. Royal College of Music categories of exceptional expenditure

Expenditure type	% of exceptional cost
Access to world-class musicians, already working at the highest levels of the profession	37
Physical environment and infrastructure that replicates high professional standards	36
Drawing in new audiences for classical music and contributing to the local and regional community	11
Quality assurance	10
Entry by auditions open to all	6

Source: RCM REFI; LSE London categorisation

Appendix B: Career portraits of selected conservatoire alumni

RAM alumni

Sir Simon Rattle (conductor)

Simon Rattle graduated from the Academy in 1974. That year he won the John Player Conductor Competition and was appointed assistant conductor of the Bournemouth Symphony Orchestra. Between 1980 and 1998 he was Principal Conductor of the City of Birmingham Symphony Orchestra. During that time he established an enviable international reputation for the orchestra and was instrumental in the development of Birmingham's Symphony Hall. Rattle's artistry and his energy as an advocate for music and music education have made his name one of the most globally recognisable in music. In 1999 he succeeded Claudio Abbado as Principal Conductor of the Berlin Philharmonic Orchestra. His recordings are critically acclaimed and have won many awards, including three Grammys.

Oliver Coates (cellist)

Oliver Coates is Artist in Residence at Southbank Centre and widely in demand as a solo cellist, chamber musician, principal cellist with orchestras (including the London Sinfonietta and the Britten Sinfonia) and as a producer and collaborator in new music. He has played in and developed projects with Seb Rochford, Micachu and the Shapes, Massive Attack, Ben Frost, Mara Carlyle, and others.

Oliver curates *Harmonic Series* at Southbank Centre, a cross-genre exploration of new and old music, which sold out in its first season and featured work by Emily Hall and James Blake, among others. *The Seafarer*, his installation with Netia Jones and David Sheppard in the boiler room and dark utility corridors of the Royal Festival Hall, opened in July 2011 and ran through the summer, as part of the Festival of Britain anniversary celebrations.

He has performed concertos and recitals across Europe and the Far East, including a tour of performances of the Dvorak Concerto in the composer's centenary year. He made his Wigmore Hall solo debut in 2009, playing the world premiere of a childhood Cello Sonata by Benjamin Britten. He is proud to have worked closely with composers such as Crane, Adès, Birtwistle, Saariaho, Lindberg, Lachenmann, Gubaidulina and Jonathan Harvey on their music, as well as with leading younger composers. He regularly plays at the major classical music festivals as well as festivals such as Latitude, Ether, and In the Woods.

Edward Gardner (conductor)

Edward Gardner graduated from the Academy's postgraduate conducting programme in 2000. After three years assisting Sir Mark Elder at the Hallé Orchestra he was appointed Musical Director of Glyndebourne Touring Opera in 2004. In 2007 he was appointed Music Director of English National Opera. Under his direction the company has produced a series of stellar productions, including *Death in Venice*, *The Damnation of Faust*, *Boris Godunov*, and *Der Rosenkavalier*. In recognition of his leadership Ed won the Olivier Award for Outstanding Achievement in Opera in 2009.

Ed also performs regularly at some of the most prestigious houses outside the UK, including the Metropolitan Opera New York, La Scala Milan, and the Paris Opera. His conducting has

reached a wide audience through the worldwide broadcasting of the Last Night of the BBC Proms and through his recordings for Chandos and EMI.

Eliza Lumley (musical theatre)

Since graduating from the Academy's Musical Theatre programme in 1997, Eliza's credits include musical and straight theatre: Mrs Banks in Mary Poppins (Prince Edward Theatre, West End), Nellie in South Pacific (Grange Park Opera), The Secretary in Jumpers (National Theatre and Piccadilly Theatre, West End and Brooks Atkinson Theatre, Broadway), Cariola in The Duchess of Malfi (National Theatre), Nerissa in The Merchant of Venice (RSC, Stratford and World Tour), Jerry Springer - The Opera (BAC), Linda in Pal Joey (Chichester Festival Theatre), Antonia in Man of La Mancha (Covent Garden Opera Festival), Ali in Mamma Mia! (Prince Edward Theatre, original cast member and created the role), and Sybil Vane in Dorian (Arts Theatre, West End).

Radio work and concerts include Sweet Charity, Ragtime, Carousel (Radio 2), Man of La Mancha (Radio 3), solo performances on Loose Ends (Radio 4) and In Tune (Radio 3), Side By Side by Sondheim (Novello Theatre), Cole Porter Classics (Barbican, and Symphony Hall in Birmingham).

Eliza has recorded a solo album ('She Talks in Maths – Interpretations of Radiohead'), which went to no. 1 on the iTunes jazz chart.

Gareth Malone (outreach)

Since graduating from the Academy's postgraduate vocal studies programme in 2005, Gareth has quickly established himself as the best-known face working in musical outreach in the UK. His three television series The Choir (BBC 2) have won many awards, including BAFTAs (2007 and 2009), an RTS award (2009), and an International Emmy Award (2011). In addition to his broadcasting work, Gareth ran the LSO Community Choir, based at St Lukes in Old Street. His music education work was recognised by the award of the Freedom of the City of London in 2010.

Gareth's public profile has recently been enhanced with prominent articles devoted to his work in The Sunday Times and The Independent.

Benjamin Wallfisch (composition)

Benjamin Wallfisch is an Emmy, Ivor Novello and multiple World Soundtrack Award nominated composer. To date, he has worked on 29 feature films, working closely with directors including Terry Gilliam, Thomas Vinterberg, Lars von Trier, Joe Wright and Rupert Wyatt.

After graduating from the Academy's postgraduate composition programme he made his debut as film composer at the age of 24, scoring von Trier's Dear Wendy. His work on this score earned him a nomination as 'Discovery of the Year' in the 2005 World Soundtrack Awards and 'Best Original Score' in the 2006 Danish Film Academy Awards. His subsequent score, for Rupert Wyatt's The Escapist earned him a nomination as 'Best Original Film Score' in the 2009 Ivor Novello Awards and his second nomination as 'Discovery of the Year' in the 2008 World Soundtrack Awards. The film was featured in the 2008 Sundance Film Festival.

Benjamin orchestrated and conducted Dario Marianelli's Oscar- and Golden-Globe-winning score for Atonement and has worked as lead orchestrator on numerous other studio pictures such as Pride and Prejudice (Oscar nominated, Best Original Score 2006), Jane Eyre, and Ridley Scott's Robin Hood.

Benjamin is also in demand as a concert composer and conductor and has worked closely with orchestras including the Los Angeles Philharmonic, London Symphony Orchestra, London Philharmonic and Sydney Symphony Orchestra, performing in venues including the Hollywood Bowl, Sydney Opera House, Amsterdam's Concertgebouw and the Royal Festival Hall.

Guildhall alumni

Sir James Galway (classical flute)

Guildhall School alumnus Sir James Galway is an internationally acclaimed classical flute player and entertainer whose appeal crosses musical boundaries. Sir James tours extensively, has sold over 30 million albums sold and appears frequently on television here and internationally.

The 1st James Galway International Flute Competition will be held in Belfast in June 2012, in collaboration with the Ulster Orchestra, BBC Northern Ireland, Northern Ireland Tourist Board and the Northern Ireland Arts Council. Sir James has created this competition as a platform to help launch and promote young flutists.

As well as performing, Sir James shares his knowledge and experience with young musicians by conducting annual masterclasses; commissioning new works for the flute (by Amram, Corigliano, Bolcolm, Maazel); and publishing articles, flute studies and books. Working with flute companies, he has developed a new student flute – The "Galway Spirit" by Conn-Selmer.

He is active in charitable work, fundraising for the arts and organizations such as UNICEF, Youth Music UK, FARA, SOS and others. Sir James is the recipient of numerous awards such as Musician of the Year by Musical America, The Recording Academy's President Merit Award, The Classic Brits Outstanding Contribution to Classical Music Award, Ford Honors, Hollywood Bowl Hall of Fame, and in December 2009, he was made the First Artist Laureate of the Ulster Orchestra. He received an OBE in 1979 and a Knighthood for Services to Music in 2001. A discography of over 65 CDs, many of them platinum and gold, reflects his musical diversity.

Paul Lewis (pianist)

Since graduating from the Guildhall School in 1994, Paul Lewis has become internationally recognised as one of the leading pianists of his generation. His many awards have included the Royal Philharmonic Society's Instrumentalist of the Year Award, the South Bank Show Classical Music Award, the *Diapason d'or de l'annee*, two successive Edison awards, the 25th *Premio Internazionale Accademia Musicale* Chigiana in Siena, the *Preis Der Deutschen Schallplattenkritik*, a Limelight Award in Australia, and three Gramophone awards, including Record of the Year in 2008. In 2009 he was awarded an Honorary Doctorate by the University of Southampton.

His concert performances and Harmonia Mundi recordings of the complete Beethoven sonatas, concertos and the Diabelli Variations have earned him unanimous acclaim from all over the world, culminating in 2010 with the honour of becoming the first pianist in the history of the BBC Proms to perform all five Beethoven Concertos in a single Proms season.

Paul has been a guest at many prestigious venues and festivals including the Schubertiade Schwarzenberg, the Roque d'Antheron Piano Festival, the Rheingau Festival, and London's Wigmore Hall where he has appeared on more than fifty occasions. He has performed with many of the world's leading conductors including Sir Colin Davis, Bernard Haitink, Christoph von Dohnanyi, Sir Mark Elder, Sir Charles Mackerras, Wolfgang Sawallisch, Daniel Harding, Sir Andrew Davis, Andris Nelsons, Emmanuel Krivine, and Armin Jordan.

At the beginning of 2011, Paul embarked upon a two-year project to perform all the mature piano works from the last six years of Schubert's life. This series is being presented in London, New York, Chicago, Tokyo, Melbourne, Rotterdam, Bologna, Florence, the Schubertiade Schwarzenberg, and at other major venues worldwide.

Sir George Martin (record producer and composer)

Sir George Martin is arguably the world's most celebrated record producer. In a career spanning over six decades, Sir George has worked in music, film, television and live performance.

Having studied composition, piano and oboe at the Guildhall School, Sir George worked for the BBC's classical music department, then joined EMI (who owned Parlophone) in 1950. His name is irrevocably linked to those of The Beatles and Abbey Road; however he was recording classical music, jazz, pop and comedy long before he signed The Beatles to the Parlophone label. He has worked with innumerable artists including Ella Fitzgerald, John Williams, Peter Sellers and Peter Ustinov, Spike Milligan and Cilla Black.

Sir George has composed film scores since the early 1960s, as well as being a producer and arranger. He composed the instrumental score of the film Yellow Submarine and Live and Let Die. Martin composed Adagietto for Harmonica & Strings for Tommy Reilly, Theme One for BBC Radio 1, and Magic Carpet for The Dakotas.

He left EMI in 1965 and, with three other producers, formed the AIR London group of companies. He then led the design and construction of one of the largest and most successful studio operations in the world – AIR Studios in North London – and built another state-of-the-art complex on the Caribbean island of Montserrat. In recognition of his services to the music industry and popular culture, he was made a Knight Bachelor in 1996.

Bryn Terfel (opera)

In 1989, Bryn Terfel graduated from the Guildhall School Opera Course, having won the School's Gold Medal for Music, and rose to prominence when he won the Lieder Prize in the 1989 Cardiff Singer of the World Competition. Since then, he has performed in all the great opera houses of the world, and is especially recognised for his portrayals of Figaro and Falstaff. Other roles include Wotan in *Das Rheingold* and *Die Walküre*, Holländer in *Der fliegende Holländer*, Méphistophélès in *Faust*, both the Title Role and Leporello in *Don Giovanni*, Jochanaan in *Salome*, Scarpia in *Tosca*, *Gianni Schicchi*, Nick Shadow in *The Rake's Progress* and Balstrode in *Peter Grimes*.

Bryn is also known for his versatility as a concert performer, with highlights ranging from the opening ceremony of the Wales Millennium Centre to Last Night of the Proms and the Royal Variety Show. In 2007 he sang the title role in concert performances of *Sweeney Todd* as part of the re-opening of the Royal Festival Hall, London. He has given recitals in the major cities of the world and hosts his own festival every year in Faenol, North Wales.

He is a Grammy, Classical Brit and Gramophone Award winner with a discography encompassing operas of Mozart, Wagner and Strauss, and more than ten solo discs including Lieder, American musical theatre, Christmas Music, Welsh songs and sacred repertory. In 2003, Bryn was made a CBE for services to Opera in the Queen's New Year Honours list and in 2006 was awarded the Queen's Medal for Music.

Guy Chambers (songwriter and producer)

A 1985 composition graduate of the Guildhall School of Music & Drama, Guy Chambers is perhaps best known for his collaboration as a songwriter and producer with Robbie Williams on five albums that together sold 40 million copies. His CV stretches from playing keyboards with Julian Cope and World Party in the mid-80s, to writing and producing for pop artists such as Kylie Minogue, James Blunt, Jamie Cullum, Katie Melua, Scissor Sisters and The Wanted.

For his work with Robbie Williams, Guy received numerous awards including 3 BRITs, 3 Ivor Novellos, a Q Classic Songwriter Award and an MMF best-produced record award for *I've Been Expecting You*. He has also worked on several film soundtracks including *Bridget Jones's Diary*, *Finding Nemo*, *Love Actually* and collaborated with Queen on their classic track *We Are the Champions* for *A Knight's Tale*.

He has recently been involved in two new prime-time BBC2 programmes: the documentary *Goldie's Band: By Royal Appointment* in which he acted as a mentor to a group of disadvantaged young musicians put together by drum 'n' bass artist Goldie and which culminated in a gig in a ballroom at Buckingham Palace; and *Secrets of the Pop Song* for which Guy was paired up with Mark Ronson, Rufus Wainwright and The Noisettes to write songs on the spot that purposely fit pre-selected genres of music.

In order to encourage new artists he has established The Orgasmatron, a bi-monthly cabaret event in Shoreditch, which showcases young new artists alongside some of the star performers that he works with.

RCM alumni

Alfie Boe (opera)

Known as 'the world's favourite tenor', Alfie Boe left his local school in Fleetwood to become a paint sprayer in a Blackpool car workshop. His unique vocal talent was spotted, and he was awarded a scholarship to study at the RCM. He later studied at the National Opera Studio and as a member of the Royal Opera House's Vilar Young Artists' Programme. He was quickly catapulted to fame, and has since appeared at many of the world's major opera houses including Covent Garden, English National Opera and La Scala Milan. Baz Luhrmann, who had spent two years looking for the lead for his Broadway production of La bohème, approached Boe for the role, and more recently Alfie has starred in Les Misérables in London. Alfie was

signed to the Classic FM Presents label as their first signing in a new venture for the radio station and his album, *Classic FM Presents Alfie Boe,* reached number three in the UK classical chart in 2006.

Sarah Connolly (opera)

Sarah Connolly CBE, is one of the foremost British mezzo sopranos. She is a Fellow of the Royal College of Music where she studied piano and singing. She has been nominated for a Laurence Olivier Award, a TMA Award, two Grammy Awards and has won Edison, Gramophone and South Bank Awards. On the operatic stage, highlights include *The Composer* at The Metropolitan Opera, New York, *Dido* at La Scala and *Giulio Cesare* at Glyndebourne. She has performed her concert and recital programmes around the world including at Carnegie Hall, the Dresden Staatskapelle and the Concertgebouw, Amsterdam. Sarah Connolly was made a Commander of the British Empire in the 2010 New Year Honours.

During the 2011 Gustav Mahler celebrations, Connolly performed all of Mahler's vocal works in the UK and abroad with the Philharmonia and Maazel, the LPO and Jurowski and Nezet Séguin, the LSO with Alsop, the OAE with Rattle and the Leipzig Gewandhaus Orchestra under Chailly. Committed to promoting new music, her performances include Sir John Taverner's *Tribute to Cavafy* at the Symphony Hall, Birmingham and his film music to *Children of Men*. She also made the first commercial recording of Mark-Anthjony Turnager's *Twice Through the Heart* with Marin Alsop and the London Philharmonic Orchestra, having previously given the Belgian and Dutch premieres of the work with the Schoenberg Ensemble conducted by Olier Knussen. She sang the role of Susie in the premiere production of Turnage's opera The Silver Tassie at English National Opera in 2000, which was subsequently released in a 2002 commercial recording.

Barry Douglas (piano)

Barry Douglas has established a major international career since winning the Gold Medal at the 1986 Tchaikovsky International Piano Competition, Moscow. In 1999 he formed Camerata Ireland, an all-Irish chamber orchestra with players from both Northern and Southern Ireland, to celebrate "the wealth of Irish musical talent." He continues to be the group's artistic director. He is also artistic director of the Clandeboye Festival and Castletown Concerts, Ireland. As a soloist, highlights of the 2011/12 season included engagements with the Orchestre Philharmonique de Radio France, Royal Philharmonic Orchestra, SWR Baden-Baden, Orquesta y Coro de la Comunidad de Madrid and Ulster Orchestra amongst others. In August 2011 Barry returned to the BBC Proms with the BBC Symphony Orchestra. They performed the worldwide premiere of a new concerto written by Kevin Volans to celebrate Barry's 50th birthday. Barry regularly tours Europe, the USA, Russia and South America in recital, and has recently performed in Barcelona and Rio de Janeiro. This season he opens and closes the BBC Radio 3 / LSO St Luke's Beethoven sonata recital series, and will go on to present recitals in Italy, the Netherlands and Moscow.

Anna Meredith (composer and performer)

Anna Meredith is a composer and performer of electronic and acoustic music. Her acoustic material has been performed around the world by many leading orchestras and ensembles. She has been composer in residence with the BBC Scottish Symphony Orchestra and is currently the PRS/RPS Composer in the House with Sinfonia ViVA.

She came to public attention through her 2008 work *froms* for the BBC Last Night of the Proms and has since written another BBC Prom commission, her first opera (*Tarantula in Petrol Blue* - with libretto by Philip Ridley) and collaborated with the beatboxer Shlomo to write the acclaimed *Concerto for Beatboxer and Orchestra*. Anna is also a judge for the BBC Young Musician of the Year, a mentor for Goldie for the TV show *Classic Goldie* and a frequent guest and commentator for the BBC Proms and other Radio 3 and 4 shows.

Anna was the classical music representative for the 2009 South Bank Show Breakthrough Award and recently won the 2010 Paul Hamlyn Award for Composers. Her most recent piece, *Four Tributes to 4am* for orchestra, electronics and visuals by Eleanor Meredith, was premiered by Sinfonia ViVA and André de Ridder as part of the ABO Conference in February 2011. She has also been awarded one of the 20x12 Cultural Olympiad Commissions to work on a new flashmob/no instruments piece for the National Youth Orchestra for performance during 2012.

Anna is building a reputation for her eclectic electronic work which she has performed throughout Europe alongside a diverse range of artists. She has supported supporting These New Puritans in Berlin, James Blake, Seb Rochford and Max de Wardener at Ether 2011 and performed a solo set at La Carrière de Normandoux. She has recently been touring, performing alongside Mira Calix their compositions for string quartet and sampled MRI scanner as part of Brainwaves. Anna is currently performing and promoting her debut four-track EP *Black Prince Fury,* and is working towards an album of new material.

John Wilson (conductor and arranger)

A scholar at the RCM in the 1990s, John Wilson is now celebrated as a conductor, arranger and scholar. Recognised internationally as an expert in light music, jazz and music for screen, John is a passionate advocate for British music, on which he is a respected authority. He works regularly with the Royal Liverpool Philharmonic, City of Birmingham Symphony, Hallé, Philharmonia, BBC Scottish, BBC Symphony and BBC Concert Orchestras. After his Proms debut in 2007, he made triumphant returns in 2009 and 2011, conducting his own orchestra in programmes celebrating 75 years of MGM musicals and other film music. The programmes were watched live by many millions and repeated on several occasions.

He recently signed an exclusive contract for his orchestra with EMI. A keen advocate of British music, his discography includes works by John Ireland with the Hallé, four highly acclaimed recordings of the music of Eric Coates with the BBC Concert Orchestra and the RLPO, and works by Vaughan Williams, Bax and Edward German. A prolific arranger, he has produced countless orchestrations for film, radio and television. He arranged and conducted the music for Kevin Spacey's film *Beyond The Sea*, the score of which was nominated for a 2006 American Grammy Award. He enjoys a close working relationship with Paul McCartney and has orchestrated and conducted several of his compositions with the London Symphony Orchestra. In the USA his arrangements and orchestrations have been played by the Chicago Symphony, Boston Pops, National Symphony of Washington and Cleveland orchestras.

Appendix C: Recent teachers of master classes at one or more of the London conservatoires

Pierre-Laurent Aimard (piano)
Meyrick Alexander (bassoon)
Alessio Allegrini (horn)
Sir Thomas Allen (voice)
Eric Aubier (trumpet)
Alison Balsom (trumpet)
Django Bates (jazz)
Emily Beynon (flute)
Sir Harrison Birtwistle (composer)
Barbara Bonney (voice)
Thomas Brandis (violin)
Alfred Brendel (piano)
Dudley Bright (trombone)
Susan Bullock (voice)
Iain Burnside (piano)
Anner Bylsma (cello)
Imogen Cooper (piano)
John Copley (opera direction)
Barry Douglas (piano)
Dave Douglas (jazz)
Dame Anne Evans (voice)
Catrin Finch (harp)
Leon Fleisher (piano)
Reinhold Friedrich (trumpet)
Paul Galbraith (guitar)
Kenneth Gilbert (harpsichord)
Johannes Goritzki (cello)
Peter Herresthal (violin)
Daniel Hope (violin)
Roy Howat (piano)
Stephen Hough (piano)
Dame Kiri te Kanawa (voice)
Paul Katz (cello)
Jonathan Kelly (oboe)
Angelika Kirchschlager (voice)
Lang Lang (Piano)
Paul Lewis (piano)
Dame Felicity Lott (voice)
Andrew Marriner (clarinet)
Malcolm Martineau (voice & piano accompaniment)
Matthew McDonald (doubler bass)
Patrick Messina (clarinet)
Truls Mork (cello)
Murray Perahia (piano)
David Pountney (opera direction)
Thomas Quasthoff (voice)
Marisa Robles (harp)

Alexander Rudin (chamber music)
Dominic Seldis (double bass)
Stephen Sondheim (musical theatre)
Yevgeny Sudbin (piano)
James Taylor (jazz)
Caryl Thomas (harp)
Sir John Tomlinson (voice)
Mitsuko Uchida (piano)
Jorgen van Rijen (trombone)
Maxim Vengerov (violin)
Roger Vignoles (vocal)
Radovan Vlatkovic (horn)
Fabio Zanon (guitar)
Yuri Zhislin (violin & viola)
Zvi Zeitlin (violin)

Source: RAM, Guildhall, RCM

Appendix D: Defining economic and social values

'The creative class' is a term coined in the late 1990s that refers not just to the people working on 'creative content' such as science and engineering, IT, architecture and design, education, arts music and entertainment, but also to an ethos that values the output of those actions (DCMS 2001; Florida 2002, 2005). Also known as 'cultural industries', the arts are considered to be a significant sub-sector of these activities with direct and indirect impacts on society (see Table 1 for the full United Nations definition) (UNCTAD and UNDP 2010). Music, along with literature, dance, drama and visual arts is considered a 'traditional' art.

UNCTAD definition of the creative economy
The "creative economy" is an evolving concept based on creative assets potentially generating economic growth and development: • It can foster income generation, job creation and export earnings while promoting social inclusion, cultural diversity and human development. • It embraces economic, cultural and social aspects interacting with technology, intellectual property and tourism objectives. • It is a set of knowledge-based economic activities with a development dimension and cross-cutting linkages at macro and micro levels to the overall economy. • It is a feasible development option calling for innovative, multidisciplinary policy responses and interministerial action. • At the heart of the creative economy are the creative industries.

Source: *UNCTAD/UNDP 2010, p.10*

Defining the creative, cultural or arts sector is by no means a settled affair. The sheer numbers of creative activities within the industry – and the varying ways in which different countries define those – makes it difficult to refer to any single concept. This inconsistency leads to problems with data collection that have a bearing on funding, education, training, policy and advocacy (Bennett 2008: 13). In the UK context, DCMS has identified 14 sub-sectors, while other reports on this topic have entire chapters dedicated to reviewing the term (Atton et al. 2008). Alan Scott (2010a), one of the leading theorists in the field, has expressed concern over this plethora of open definitions, which he argues point towards the need not just to be particular about the economies being described, but significantly for this report, about the distinct music industries within those as well. Others have similarly argued that 'the music industry' is too often described as a single unitary force of homogeneous objectives and interests, conflated with the recording and publishing industries rather than being explored in what is in fact its full complexity and diversity (Williamson and Cloonan 2007).

Within the realm of urban and regional planning, certain critiques insist that there is risk involved in utilising fuzzy theories based on implicit normative assumptions about 'the good' of the arts and culture for achieving economic, social and environmental benefits. Rather than assuming straightforward economic benefit, it is argued, 'researchers should unpack, critique, and evaluate outcomes according to norms and goals (Markusen and Gadwa 2010: 380). It has recently been argued that the direct and indirect impacts of culture-led regeneration schemes should be monitored rather than evaluated over long periods of time to allow for more rich and general comparisons (Ennis and Douglass 2011). Moreover, despite the relevant optimistic figures 'thrown around' about the links between creative industries, economic growth and employment, the most scathing critiques levelled against the industry are about

the lived precariousness and insecurity that often results from such work (Huws 2007; Knell and Oakley 2007; Ross 2007; Towse 1993).

Definitional issues are also connected to the fact that the very notion of *valuing creativity*, in all of its associated expressions and activities, is not uncontested. In the context of economic valuations of the arts, this is often debated around questions of its inherently symbolic versus utilitarian function (Scott 2010a). A recent RSA report has suggested moving beyond the classic dualism that sees the autonomous and creative aspects of cultural policies as set against their more 'objective-led' forms of instrumentalisation (that is, its social versus economic relevance). It offers an alternative categorisation that differentiates between 'artistic instrumentalism' (concerned with artistic quality standards and aesthetic/spiritual/social experience) and 'public good instrumentalism' (concerned with positive economic and social outcomes) (Knell and Taylor 2011). It is argued that embracing this conceptual disentanglement, especially in the current context of public sector cuts, will help to make distinct organisations' subsequent cases for funding and subsidies more successfully.

Appendix E: Statistical reports about impact of London's creative industries on employment figures

Date	Reported impact on employment	Source
2004–2010	UK employment in the creative and cultural industries has increased by approximately 11% between 2004 and 2010. In England, it has increased by 12%.	*Sector Skills Assessment for the Creative and Cultural Industries, England,* Creative and Cultural Skills, 2011.
2008	Estimated that the total creative employment of the UK was 1,887,878. Of these, 1,242,811 (66%) were employed in the creative industries, and 645,067 (34%) engaged in creative roles in non-creative industries. Of the 1,242,811 employed specifically within the creative industries, 552,170 (44%) were engaged in specialist creative occupations, whilst 690,641 (56%) were engaged in business and support occupations. The report also found that creative employment in the UK had grown by 3.2% between 1981 and 2006, compared to 0.8% for the broader economy.	*Beyond the creative industries: mapping the creative economy in the United Kingdom*, National Endowment for Science, Technology and the Arts (NESTA), 2008
2007	Employment in some sections of the creative industries was growing by 6% per annum.	*Publicly-funded culture and the creative industries*, John Holden/Demos for Arts Council England (ACE), June 2007.
2005	There were 1.8 million jobs in creative employment, of which one million were in the creative industries and the remainder were creative jobs in businesses outside the creative industries.	*Creative Industries Economics Estimates Statistical Bulletin*, Department of Culture, Media and Sport (DCMS), 2006
1995–2005	Firms in "layer 1" of the creative industries (defined by current DCMS methodology as being engaged in the core creative processes around which broader business structures develop) grew their turnover by £66.4 billion, and their employment by 290,000.	2005 *The Creative Economy Programme: A Summary of Projects Commissioned in 2006/07*, DCMS, August 2007.
2001/05	After falling for four years after 2001, total creative employment in London turned up again in 2005.	*Measuring Creativity: 2006 update of the GLA's creative industry economic data*, Greater London Authority, 2006, cited in *Staying Ahead: the economic performance of the UK's creative industries*, The Work Foundation for DCMS, 2007

2004	The creative industries represented London's third largest employment sector, with 525,000 people working directly in the creative industries or in creative occupations in other sectors.	*London Cultural Capital; Realising the potential of a world-class city,* Greater London Authority (GLA), 2004.
2004	One in seven jobs was in the creative sector.	*London's Creative Sector*, GLA, 2004, quoted in *Publicly-funded culture and the creative industries*, John Holden/Demos for ACE, June 2007.
1997–2004	Employment in the UK creative industries grew at a rate of 3% per annum, compared with a rate of 1% for the economy as a whole.	*Creative Industries Economic Estimates Statistical Bulletin*, DCMS, 2004.
1995–2001	London's creative industries grew faster than any other major industry except the financial and business sector, and accounted for between 20 and 25% of job growth in London during this period.	*Staying Ahead: the economic performance of the UK's creative industries*, The Work Foundation for DCMS, 2007.
1995–2001	The creative industries accounted for between a fifth and a quarter of job growth in London	*The Creative Economy Programme: A Summary of Projects Commissioned in 2006/07*, DCMS, August 2007

Appendix F: Estimates of the economic impact of the arts on New York City (2005)

Sector	Impact					
	Total		Generated			Other
	$	%	Number of jobs	Wages $	Taxes to NYC $m	
Arts industry	*21.2b*	*100*	160,300	8.2b	904	
Commercial	*10b*	*38*				
Non-profit cultural organizations Non-profit theatre	*5.8b* Has shown most growth of all sectors 253.1m	27	40,460	2.2b	170	Music & opera = *$ 422m* (includes: musical performing groups, including opera and musical theatre, service organizations, performance facilities, arts centres, festivals and cultural series organizations focusing on music and opera)
Arts-motivated visitors	*5.4b* (3.7b over and above the cost of tickets or admission fees) Spending grew by 54% from 1992 to 2005. Cultural institutions and Broadway theatres = $7.5m	26	55,700	1.9b	369	Estimated 400m visits to NYC's cultural attractions, including concerts and theatre.
Commercial theatre (Broadway and off-Broadway)	*2b*	9	13,500	730m	66m	

Source: Scanlon and Lanier (2007) 'Arts as an Industry'

Appendix G: Flagship outreach programmes

Institution	Flagship project name	Description
Royal Academy of Music	Open Academy	Compulsory module which, trains the Academy's third-year undergraduates to practice leadership in music in very different kinds of social contexts and through diverse working methods such as collaborative composition and project planning. This module is then offered at more specialised levels to fourth-year undergraduates and postgraduates. It is also integrally linked to the 'Open Academy Business Placement Scheme' which seeks to introduce students to the music industry environment early-on. **Outcomes included:** 3000 people (btw. 3–96) participated in projects and summer schools in 2007/08
Guildhall	LINK Alliance	A unique partnership with the Barbican Centre and the London Symphony Orchestra (LSO) where the new Guildhall building 'Milton Court' will provide the nexus from where to integrate the performance and education elements of the three organisations. It will provide a physical space where to bring together all of the Guildhall School's outreach activities with the Barbican's education programme, reaching over 30,000 young people in London, the UK and internationally. The LSO element integrates the industry more deeply into the educational activities by providing resources for orchestral training, mentoring and coaching, as well as opportunities for students to rehearse and perform, and audition.
	Connect II (2002–03); (2003–05): Youth Music and Creative Partnerships	Creative music project for ages 8–18 offering new opportunities to engage with music creatively in workshops, performances and projects, while expanding competences of undergraduate musicians in community contexts. The first took place in Lewisham and Newham. **Outcomes:** - 3000 young people took part in workshops, performances and projects that lasted between 1 day and 10 weeks - Ensembles emerged and evolved, continuing to meet, compose and perform - Exploration of new instrumental teaching and learning methods, moving with and beyond one-to-one tuition - Cross-arts collaborations

Royal College of Music	RCM Sparks	Learning and participation programme that includes weekend workshops, holiday courses for teenagers, vocal days for families, and opera matinees for school in partnership with local schools, community music projects and international organisations. Some of it most prominent achievements include: • Working in 2009 with over 3000 children, schools and members of the community – over 2700 were new to the RCM • 60% places at community workshops are offered free of charge, actively recruiting from the local Borough to allow children from low socio-economic backgrounds to take part regardless of means.
	Musicians of the Future (2010)	5-year instrumental teaching programme to increase uptake of orchestral instruments in state schools. **Outcomes included**: - 2 borough orchestras made up of 'MoF' graduates (with Royal Borough of Kensington and Chelsea) - Marked increase of general music activity & take-up of GCSE at some schools - More than 800 children learned an instrument - More than 3000 children accessed live music experience - 120 children have continued to learn an instrument through programmes led by RCM musicians - Partnerships with borough and community groups (ex: Exhibition Road Cultural Group & Hammersmith Academy).

Source: RCM, Guildhall, RAM

Appendix H: External interviewees (in person and by e-mail)

NAME AND ROLE	ORGANISATION
Matthew Barley	International freelance cellist
James Brown, Managing Director	Hazard Chase Artists Management
Susanna Eastburn, Director Music	Arts Council England
Ara Guzelimian, Dean	Juilliard
Paul Hughes, Managing Director	BBC Symphony Orchestra
Stephen Lumsden, Managing Director	Intermusica Artists' Management
Sir Peter Maxwell Davies	Composer, conductor and Master of the Queen's Music
Christopher Mossey, VP Global Initiatives	Juilliard
Gillian Moore, Head of Contemporary Culture	South Bank Centre
Richard Morrison, Classical Music Critic; Comment/Feature writer	The Times
Mark Pemberton, Director	Association of British Orchestras
Hazel Province, Planning Director	Royal Opera House
Rosemary Reyes, Manager Global Initiatives	Juilliard
Timothy Walker, Chief Executive and Artistic Director	LPO
Roger Wright	Controller BBC Radio 3 Director of BBC Proms

Appendix I: Relevant links

United Kingdom

Incorporated Society of Musicians
MU (Musicians Union)
British Actor's Equity Association
Conservatoires UK
Association of British Orchestras
Association of Independent Music (AIM)
British Academy of Songwriters, Composers & Authors (BASCA)
Creative and Cultural Skills

Europe

Association Europeenne de Conservatoires (AEC)
Polifonia publications

USA

Higher Education Arts Data Service (HEADS), operated by the National Association of Schools of Music
College Music Society (CMS)
National Research Centre for the Arts
National Art Education Association
American Music Conference
Americans for the Arts

London's Orchestras and Ensembles

Association of British Orchestras
http://www.abo.org.uk/Information/About-Orchestras/

Academy of St Martin in the Fields
http://www.asmf.org

BBC Philharmonic Orchestra (employ full time musicians on a contract)
http://www.bbc.co.uk/orchestras/philharmonic/

BBC Symphony Orchestra (employ full time musicians on a contract)
http://www.bbc.co.uk/orchestras/so/index.shtml

City of London Sinfonia
http://www.cityoflondonsinfonia.co.uk

London Chorus
http://www.londonchorus.org.uk/

London Mozart Players
http://www.lmp.org/

London Soloists Chamber Orchestra
http://www.londonsoloists.com

London Symphony Orchestra (resident at the Barbican)
http://www.lso.co.uk/

Orchestra of the Age Of Enlightenment
http://www.oae.co.uk/

Philharmonia Orchestra (residencies at the Royal Festival Hall, Bristol, Basingstoke, Bedford, Leicester)
http://www.philharmonia.co.uk/

Royal Philharmonic Orchestra (series at the Royal Albert Hall, Royal Festival Hall, resident at Cadogan Hall, Fairfield Halls, Northampton, Sydenham) http://www.rpo.co.uk/

Companies with their own orchestras

***All employ full-time musicians on contract**

- English National Ballet
- English National Opera
- Royal Opera House

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