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“A Question of Value?”  
Mapping and Measuring the Scottish Music  
Industries

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Submitted in fulfilment of the requirements for the Degree of  
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School of Culture and Creative Arts

College of Arts

University of Glasgow

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## Abstract

The Scottish music industries have so far been neglected in favour of mapping UK-wide music activities. Although small in scale, Scotland often punches above its weight in creative output and deserves to be examined on its own merit. Therefore, this study will redirect the academic focus to the Scottish context, offering the first national mapping investigation of the last twenty years.

The thesis is a sociological investigation exploring the working lives and experiences of music creators and cultural intermediaries living in Scotland. The thesis uses semi-structured interviews and an online survey with the additional collection of desk-based research. The study first provides a foundation for the remainder of the thesis by examining seven key sectors of activity from an artist-centric perspective. Those sectors are then measured to estimate their economic worth. The music sector is then examined for its value-creating abilities, arguing that exchange-value should not be given primacy over use-value. Finally, the thesis examines the impact of Covid-19 in Scotland, arguing that several structural flaws, identifiable pre-pandemic, were only exacerbated by lockdown measures.

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## List of Abbreviation

ACE – The Arts Council of England

ACGB – The Arts Council of Great Britain

AHRC – Arts and Humanities Research Council

CEBR – Centre for Economics and Business Research

CEMA - Council for the Encouragement of Music and the Arts

CJRS - Coronavirus Job Retention Scheme

COSLA Convention of Scottish Local Authorities

CRF – Cultural Recovery Fund

CS – Creative Scotland

COVRF - Cultural Organisations and Venues Recovery Fund

CVP – Cultural Value Project

DCMS – Department for Culture, Media and Sport

DF – Dance Factory Concerts

GMVSF - Grassroots Music Venues Stabilisation Fund

HUFT – Hands Up for Trad

IP – Intellectual Property

MDF – Music Development Fund

MU – Musicians Union

NDFM - New Deal for Musicians

NPF – National Performance Framework

NTCs – National Touring Companies

PAVRF - Performing Arts Venue Relief Fund

PCL – Paul Cardow Limited

PRS – Performing Rights Society

PPL - Phonographic Performance Limited

SAC – Scottish Arts Council

SCMIT – Scottish Commercial Music Industries Taskforce

SEISS - Self Employment Income Support Scheme

SG – Scottish Government

SIC – Standard Industrial Classification Codes

SMIA – Scottish Music Industry Association

SNP – Scottish National Party

SWIM – Scottish Women in Music

SOC – Standard Occupational Codes

SSE Scottish Showcase Expo

TMF – Traditional Music Forum

VNA – Value Network Analysis

VNM – Value Network Mapping

YMI – Youth Music Initiative

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Before attending the University of Glasgow, I received my Undergraduate degree and MA at the University of the West of Scotland. I only intended to go for one year, but the encouragement I received motivated me to continue down the academic path. Special thanks to Alan Dumbreck, Jim Prime, Kenny Forbes, Clare Duffin and Becky Wallace.

Thanks to Lyle for telling me about this project and convincing me to apply. Special thanks to Denise for being a voice on the phone when I needed to discuss random ideas while I was distracting her from own work. A special thanks to all who agreed to be interviewed for this thesis and the many more who took part online. Your feedback has been invaluable.

The biggest thank you goes to my wife, Shannon. The cups of coffee and toast helped enormously, especially when I was an unbearable grump. In December 2021, my son Benjamin was born. He has been a source of motivation throughout the latter half of this project, often working and watching cartoons together. I love you both.

# Author's Declaration

I declare that, except where explicit reference is made to the contribution of others, this dissertation is the result of my own work and has not been submitted for any other degree at the University of Glasgow or any other institution.

Robert Allan

12 August 2024

# Chapter One: Introduction

Scotland has a long history of producing commercial artists with international success, even though it is often regarded as a limited market (Homan et al., 2014). The most recent export, Lewis Capaldi, is arguably the most significant act for some years. However, his success (and that of countless others) raises questions regarding revenue and why no music businesses in Scotland can offer investment or develop new talent. The loss of revenue from Capaldi and others like him should be alarming for the Scottish Government. If Scotland had a more robust music infrastructure, the loss of intellectual property may not occur so easily. However, the notion of value is not limited to economic analysis alone. Music inherently has both a use value and an exchange value with individuals valuing music for many different reasons. Some for the revenues it generates, some for how it makes them feel. Therefore, this thesis will investigate multiple viewpoints to offer a comprehensive analysis with a strong leaning towards an economic investigation.

Music Mapping has become popular in the UK due to Creative Industries policy (DCMS, 1998; Wilson et al., 2001; Edwards, 2020). However, more analysis has yet to emerge regarding Scotland, which is problematic as Scotland's music industries have several notable characteristics that make them distinctive to the UK context. The presentation of the UK music industry as performing well (UK Music, 2020) is highly inaccurate. Parts of the UK generate high revenues, although most of this is due to activity in London. The conflation of economic activity only continues to perpetuate this notion. Each country has a distinct infrastructure and should not be investigated and combined. This research is an essential step towards identifying the Scottish music industries' weaknesses while also identifying and celebrating its strengths.

The Scottish music industries have evolved since previous mapping reports by Williamson et al. (2003) and Ekos (2013). These changes are primarily due to the introduction of digital technologies, which has led to significant changes worthy of investigation. Vasquez asserts that digitalisation has "revolutionised the way music is created, produced, marketed, distributed, and consumed" (2017, p6),

which has had direct and indirect repercussions on notions of economic, social and cultural value. Even though elements of the Scottish music industries have attempted to adjust to the immediate changes, perennial issues remain (Williamson et al., 2003). For instance, no major record labels are based in Scotland. There is a lack of media support for new artists. Artists have limited access to Scottish record labels and publishers, leading to a loss of intellectual property, and confusion remains over the role of Scotland's main funding body, Creative Scotland.

## Background

In December 2018, I applied for a collaborative PhD advertised by the Scottish Graduate School of Arts and Humanities (SGSAH) and funded by the Arts and Humanities Research Council (AHRC). The project was tasked with Mapping and Measuring the Scottish Music Industries on behalf of the Scottish Music Industry Association (SMIA), a trade body in Glasgow that aims to promote and develop the activities of musicians and the wider music industries across the country. The project sought to map the business activities of those working in the music industries in Scotland and estimate the economic worth of music activities whilst investigating notions of value. The final thesis would then be utilised to produce a report for the SMIA revealing the sector's strengths and weaknesses, which could then be employed to lobby at the policy level within the Scottish Government. Shortly after being chosen to conduct the research, the pandemic halted all socio-cultural events globally. It became apparent that whilst the primary goals of mapping and measuring were still possible, albeit for the year 2018, it was logical to explore the impact of COVID-19 on the broader music industries in Scotland.

## Aims and Approach

This thesis aims to fill a gap in the literature regarding the commercial activities of the music industries in Scotland. One of the primary decisions has been to approach it from an artistic perspective, ultimately making it a subjective piece of work. This will offer a unique viewpoint and provide a worthwhile addition to popular music literature. The research seeks to provide an original contribution based on two research questions:

1. What was the economic value of the Scottish music industries in 2018?
2. How has the pandemic disrupted the Scottish music industries, and what are its vulnerabilities to disruption?

Based on these research questions, the thesis has three key aims:

1. To map the Scottish music industries and identify their strengths and weaknesses.
2. To examine notions of economic, social, and cultural value, with a strong leaning toward exploring the production of economic value among music creators and cultural intermediaries.
3. To investigate cultural policy decisions implemented as a result of the pandemic, with particular attention given to the impact on cultural workers.

The thesis strives to investigate the music industries in Scotland comprehensively. In order to do so, each aim will provide data, allowing the following aim to be explored and the research questions to be answered. The first aim will summarise the music sector in Scotland based on seven sectors of activity.

- Music Creators
- Live Music
- Recorded Music
- Music Representatives
- Music Retail
- Funding and Development
- The Media

The mapping data will be used to examine various types of value (economic, social and cultural) generated across the music sector in Scotland, which is the key purpose of aim two. The final aim will analyse fiscal support for music and explore cultural work from a music industries perspective against the backdrop of the Covid-19 pandemic.

The thesis will employ a mixed methods approach. First, data will be collected from a survey to identify sectoral trends and reveal annual revenues for music

creators and music businesses in Scotland. Secondly, semi-structured interviews will occur with key industry stakeholders across genres and geographical locations. The qualitative data will provide depth to the study and be cross-referenced with survey data to strengthen and corroborate the findings. Additionally, a large amount of secondary data will be accumulated from an extensive online search. This is primarily to build a database of Scottish music businesses and identify music creators.

## Definitional Issues

The term "music industry" has historically been used to represent the business activities of all music industry sectors. However, Williamson and Cloonan believe "that the notion of a single music industry is an inappropriate model for understanding and analysing the economics and politics surrounding music" (2007, p305). As a result of the COVID-19 pandemic and the following lockdown restrictions on the live sector, it is more appropriate than ever to investigate music in Scotland from a plural perspective. Therefore, the remainder of the thesis will utilise the music industries.

The economic foundations of the music industries in Scotland can be located in four commercial assets: a song or composition, a recording of that song, a live performance, and the person performing or recording as a brand (UK Music, 2021). To successfully map and estimate the sector's worth, a complete examination of the music industries is required to collate a database of business activities across the sector relating to each asset.

Throughout this thesis, the terms popular and commercial will be utilised interchangeably. However, this does not refer to "pop" music specifically. Both terms describe music creators across genres and at various career stages. In this respect, the research aligns with Cloonan, who argues:

"Intuitively one might think of popular music as being music which is popular – such as that which is in the music charts, available for sale in the high street (and over the internet) or performed before mass audiences at large festivals and gigs. However, this masks the fact that in simple numerical terms the majority of popular music released commercially is unpopular in that it sells relatively little" (2009, p4).



This thesis is part of a collaborative doctoral award between the SMIA and the University of Glasgow. The partner organisation has requested that the mapping take a popular music approach; therefore, we will apply Simon Frith's terminology that pop music "is music produced commercially, for profit, as a matter of enterprise, not art. Defined in these terms, 'pop music' includes all contemporary popular forms – rock, country, reggae, rap, and so on (2001, p94). This will include classical, folk and traditional music within the Scottish context.

Although there has yet to be a consensus regarding what comprises the music industries, various reports have offered distinct versions based on locality (Williamson et al., 2003; Carr, 2022). However, it is widely acknowledged that the recording, live, and publishing sectors are vital global economic drivers and central to most music-making economies (Hesmondhalgh, 2019; Jones, 2012; Rodgers, 2017; Wikstrom, 2010). However, a broader analysis is required to incorporate the activities that support the core businesses, such as those suggested by UK Music (2021). The public sector in Scotland provides high levels of funding via direct and indirect organisations (Scottish Government and Creative Scotland, etc). Whilst most of the funding does not go directly to commercial activities, it is critical to the functioning of the overall sector. Therefore, the Scottish music industries are a collection of economic and non-economic organisations. In this sense, it is reminiscent of a complex system, which Brunger describes as having "moving parts (people, products, processes) that are relatively simple to understand individually, but that act together to be productive and efficient without the benefit of a controlling authority" (Bruenger, 2015, p12).

A further difficulty is determining whom to include within the economic estimations based on what can be considered Scottish. Several businesses, such as DF Concerts, are identifiable as Scottish; however, they were bought over by Live Nation. Although owned internationally, DF Concerts plays a vital role by reinvesting financially into the Scottish economy and the music industries. Additionally, several large retail stores in Scotland (HMV and Fopp) are owned by international organisations that extract value without reinvesting into the Scottish music industries. It is critical to clarify why specific companies should be included whilst others are not. If revenue is generated in Scotland and reinvested back into music activities, then those businesses will be included. An additional

problem is deciding which music creators to include in the study. First, they must have been born in the country or lived here for the past ten years. If a Scottish music creator no longer lives in the country, they will be excluded as the revenue does not return to the Scottish economy.

## Thesis Structure

The thesis has nine chapters, including the introduction. Chapter Two reviews the current knowledge, providing the basis for this research, whilst Chapter Three illustrates and justifies the methods utilised to collect data and subsequently analyse it. Chapters Four to Eight present the empirical findings, and Chapter Nine will draw together the main findings and discuss their significance.

Academic research is scarce regarding the music industries in Scotland; however, Chapter Two will reveal what is already known while investigating issues of value (economic, social, and cultural) and cultural funding. Furthermore, it will provide the theoretical framework for the remainder of the thesis.

Chapter three clarifies the methodological choices selected for the study and justifies the stance. After conducting a textual analysis, a pragmatic approach was employed to assemble and investigate Scotland's music industries based on data extrapolated from the literature review. To fill in the gaps, empirical evidence was compiled from an online survey followed by a series of semi-structured interviews. The chapter concludes by highlighting the ethical practicalities of conducting this type of research.

Chapter four is the first to present findings from the empirical research. First presented in the introduction and then discussed in the literature review, the mapping chapter outlines the seven sectors of activity that occur in Scotland and investigates each of their parts in some detail. A new additional sector to this mapping report is Funding and Development, which has been included to reveal the high levels of subsidy music receives directly from the Scottish Government and at arm's length from Creative Scotland. By serving more as a descriptive chapter, the findings will reveal how the sector operates and act as a foundation for the remainder of the research.

Chapter Five will build on the investigation presented in Chapter Four by economically assessing each of the sectors within Scotland, excluding the media. There is currently no single method to estimate the revenues of each sector identified in Chapter Four; therefore, the chapter will provide in-depth details of the methods used to estimate each sector. Careful consideration will be required to eliminate the double counting of revenues across sectors. The chapter will conclude by exploring the revenue generated from music tourism using the multiplier effect to estimate the direct, indirect and induced spending linked to live music activities across Scotland.

Chapter Six will investigate the value of music over and above its economic significance. Although an under-researched topic in the music sector, the chapter will provide an overview of music's social and cultural value from a political perspective. Part two will identify the various types of value which intermediaries exchange when navigating the music industries in Scotland. The economic, cultural, social, and symbolic exchanges will be examined based on Bourdieu's concept of Capital (1986). The final section will investigate value generation within the Scottish music industries, questioning whether Scotland has a sustainable business model for developing artists and retaining revenues.

Chapter Seven will investigate the effects of the Covid-19 pandemic on the music industries. Although the immediate impact of the pandemic was linked to the live sector, its effects were far-reaching. Section one will investigate cultural workers and illustrate how they attempted to navigate the pandemic. Section two will identify the key impacts on the sector and the changing business models implemented to keep music creators and businesses afloat. Section three will illustrate the Government's response to the pandemic from a UK perspective, then narrow it down to Scotland. The final section will present the financial support provided for the music industries in Scotland by the Scottish Government and Creative Scotland.

Chapter Eight draws together the findings from primary research collected from a survey and semi-structured interviews, with the results presented thematically. These themes will then be discussed to reveal the strengths and weaknesses of

the music industries in Scotland. The thesis will then reflect on the findings by suggesting potential areas for improvement.

The final chapter will examine the main contributions and answer the research questions to display what the research has uncovered. The key aims will then be revisited and dissected based on data gaps highlighted in the literature review. The significance of the research and its limitations will be presented before reflecting on several topics. A number of policy recommendations will then be discussed, followed by areas for potential future research. The thesis will conclude with a final thought based on a quote in the literature review.

# Chapter Two: Literature Review

## Introduction

This literature review aims to analyse previous research and identify gaps that can be explored in the upcoming thesis. The research investigates several fields, such as Popular Music Studies, Cultural Studies and Policy Studies, while firmly grounded in sociology. The first section will investigate developments within cultural policy in Scotland, arguing that changes to the funding landscape have led to a lack of popular music policies. The data will help investigate the impact of COVID-19 on the music industries in Scotland.

Section two will investigate the value of music as a cultural good, demonstrating that it has both an exchange and a use value. The section will argue that analysis of music activities in the digital age can not be measured using the value chain method. Instead, it will assert that Scotland's business activities should be investigated from an ecosystem perspective to fully envisage the value-creation activities that occur across numerous sectors.

The third section will first explore mapping as an investigative tool, revealing the various reasons for mapping and the outcomes of various applicable mapping techniques. Additionally, mapping reports similar to the one requested by the partner organisation will be analysed to reveal their motivations and methods, providing a suitable methodology for data collection.

The final section will illustrate the role of cultural intermediaries. The literature will reveal the broad nature of tasks identified by Fairchild (2014), which will be vital when compiling a list of Scottish music workers for this research. Additionally, the literature will reveal that cultural intermediaries can generate value for music creators and other intermediaries across the value-creating ecosystem.

## Cultural Policy in Scotland

The first task is to explore the definition of culture. The term has several connotations depending on the era, country and discipline, which led Raymond Williams to label culture as "one of the two or three most complicated words in the English language" (1976, p87). McGuigan argues that the term has become synonymous with so much that it has almost become meaningless (2005); however, Bell and Oakley (2015) assert that the current understanding of culture is founded on two competing views, which incorporate high and popular art. Making music is a cultural activity; however, it falls within two sometimes opposing ideologies. Frith et al. believe that "a distinction between music making, something done for all sorts of reasons, in all sort of circumstances, and music exploiting, the ways in which money can be made out of music's cultural and social significance" (2009, p74) is critical as it affects how cultural policy decisions are maderegarding music.

Bell and Oakley contend that "cultural policy is the branch of public policy concerned with the administration of culture" (2014, p45). Hesmondhalgh agrees with Bell and Oakley; however, he illustrates that administration includes "the subsidy, regulation and management of 'the arts'" (2019, p177). Further analysis supports this view as it is a complex area of research that incorporates several areas of investigation, such as arts management, economics, social policy, and education. At one time, culture was funded for being a public good, which was evident after the Second World War; however, over time, that argument has faded, with the economic impact becoming more critical to policy decisions. This is primarily due to the increased interest in the creative industries and their revenue-generating possibilities.

## Historical perspective of arts funding 1945-1999

The origins of cultural policy in the United Kingdom are identifiable after the Second World War with the formation of the Arts Council of Great Britain (ACGB). John Maynard Keynes conceptualised the agency following his involvement with

the Council for the Encouragement of Music and the Arts (CEMA). Keynes used art during the war to lift public spirits and believed this should continue post-war. The ACGB set out to aid the spread of high art to improve civilisation without government involvement, which began the arms-length system of funding the arts in the UK (Upchurch, 2004). In 1967, Scotland received devolved powers from the ACGB and formed The Scottish Arts Council (SAC), which operated as a sub-committee. The usual practice was for arts councils to operate at arm's length from the government that funds them; however, in Scotland's case, it was viewed as double arm's length, providing more significant levels of autonomy over spending decisions. Although the SAC had the freedom to control spending, funding was cut by the Conservatives in 1979, with the SAC advised to find additional income sources. The 1980s saw disputes across nations due to funding decisions. The ACGB requested that the SAC stop funding amateur organisations; however, as many of the traditional art forms in Scotland depend on amateur arts, the request was rejected. By 1994, the SAC had received full autonomy from the ACGB, although this resulted in no real change other than a 10% decrease in funds between 1993 and 1997 (Galloway and Jones, 2010).

## Creating a Coherent Cultural Policy for Scotland After Devolution

Scotland received devolution following the Scotland Act (1998), which presented the country with an opportunity to make critical decisions regarding "most cultural and economic (as well as education and health) policies" (Homan et al., 2016, p23). However, several areas remain reserved for Westminster, which has ramifications for popular music in Scotland. Most notably, broadcasting policies and decision-making over intellectual property. The latter is of high significance as several scholars have identified the critical importance of copyright to the operation of music as a business (Frith, 1988; Wikstrom, 2010).

The SAC and the Convention of Scottish Local Authorities (CoSLA) hoped devolution would deliver drastic changes to the cultural landscape in Scotland; however, the most significant difference was the slow decay of autonomy. The arms-length status had all but disappeared by 2003 when a financial crisis in Scottish Opera led to the direct state funding of the National Touring Companies, independent of the SAC. Although the transition caused unrest in Scotland's art

circles, the practice was already commonplace elsewhere, with Mundy arguing that "the issue of political interference in artistic and intellectual freedom is a constant one in almost all European societies" (2000, p13). Nonetheless, Cloonan believes that devolution was a positive outcome for musicians based in Scotland as it "provided opportunities for policies to be developed at a new level", which would be "appropriate to specifically Scottish priorities" (2007, p121).

### *The National Performance Framework*

It is comprehensible that when a new government is formed, such as the Scottish Executive, it would take time to establish what role culture would play within broader policy decisions. Although culture was deemed a priority for the inaugural Labour-Liberal-Democrat coalition, their first culture strategy was "an unimaginative document within which music was all but ignored" (ibid, p122). The high turnover of cultural ministers could have slowed the prospect of implementing any real cultural change; however, the success of the Youth Music Initiative (YMI) proves this was not necessarily the case.

It was unclear which direction Scotland would take regarding funding and supporting the arts in Scotland. Galloway and Jones believe that "Scottish administrations have been strongly influenced by the discourses of creativity and creative industries policy emanating from the DCMS in London" (2010, p36). A speech from Jack McConnell signalled this in 2003 when he declared, "[t]his is not about subsidy – this is serious investment" (2003).

The SNP chose a modified approach to policymaking and implementation over Westminster by developing a National Performance Framework (NPF), which Cairney et al. describe as the "Scottish approach" (2016, p333.). The model saw consultations with professional bodies, voluntary groups, and the private sector to identify specific needs in each area, which drove more meaningful policy decisions. First introduced in Virginia, the USA, the outcomes-based national performance model would apply a bottom-up instrumental approach to policymaking (Orr, 2008, p310). According to the SG, the national performance framework's primary purpose is "to focus government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth" (APS Group, 2013, p5).



Frith and Cloonan argue that around the time the NPF was implemented, there was a global shift "from cultural policy to cultural industries policy, from treating popular music as a matter of social or cultural concern to treating the popular music industry as a matter of economic concern" (2008, p189). The use of the NPF indicates that the Scottish government wanted to adopt an economic model where outcomes could be measured, which echoed a similar approach employed by Westminster.

### *Creative Scotland*

The notion of a combined arts funding body in Scotland was initially proposed by the Labour-Liberal Democrat Coalition and proposed in their 2006 draft Culture Bill. However, the SNP gained power in Scotland in 2007, which resulted in the strategy not being used. The only part carried over by the SNP was plans for a new cultural funding body. By 2010, the SAC and Screen Scotland merged to become Creative Scotland (CS) to consolidate public bodies as part of the SNP's "Simplification Programme" (Scottish government, 2009). Cloonan notes that the "new body has been the subject of some controversy as it took on a business-orientated approach as outlined in its 10-year corporate plan, *Investing in Scotland's Creative Future*" (2016, p32). The amalgamation of SE and SS caused a major rift in the funding ecology within Scotland by "blurring the boundary between cultural and creative industries" (Stevenson, 2014, p179). Schlesinger confirms that the message delivered by the SNP drew heavily on the original DCMS document, which defined their approach to the creative industries (2009, p143).

However, by 2012, relationships between the organisation and those previously receiving long-term funding were at breaking point. Bonnar notes that the "reconfiguration of power and responsibility significantly impacted cultural policy" (2014, p143). The core issue was a need for more transparency on changes to specific funding channels. As Creative Scotland made decisions regarding national funding behind closed doors, the arts community in Scotland began using online platforms to note their concerns. Mcmillan acknowledges the reasons for the changes as valid; however, she believes that in doing so, CS positioned "49 Scottish arts organisations from a condition of modest security into a state of complete insecurity" (2012). The online debate that followed became known as the

"Stooshie", with the head of CS, Andrew Dixon, resigning. It was a difficult time for the new organisation, with Behr and Brennan describing the period as a "baptism of fire" (2013, p10), which ultimately led to "major changes in the management, style, communications and funding systems of the new body" (Bonnar, 2014, p144).

Creative Scotland has received praise since the initial criticism, particularly regarding the formation of the Scottish Music Industry Association. The SAC had previously noted that there was a need for a body to "speak authoritatively on behalf of the entire music industry in Scotland" (SAC, 2005, p4). However, Cloonan believed, "It clearly had little immediate impact" (2016, p34). The SMIA's most ambitious endeavour to date has been to commemorate the best of Scottish music by implementing the Scottish Album of the Year Award (SAY). Behr and Brennan have reported that the award provides a means that encourages "the participation of a full range of stakeholders in the music industry – and the creative sector more widely" (2013, p11). By facilitating the SAY award, the SMIA is achieving three core functions. First, they actively promote popular music alongside music funded by the state. Their partnership with record shops is aiding in promoting a revenue stream that has been in substantial decline, and they are promoting Scottish identity through the nominated group of artists (Behr and Brennan, 2014, p174). Regardless of the outcomes, Behr and Brennan argue that "the SMIA remains the most successful attempt thus far to create a unified front as a Scottish industry to gain leverage when dealing with government to lobby for policy" (ibid, p173).

## What is the purpose of Policy for Scottish Music?

Initially, cultural policy was associated with funding high arts with little market intervention; however, as music became a commoditised good, it became apparent that regulations were required. As Cloonan notes, "recorded music does not directly impact policy regulation other than copyright laws". In contrast, live music venues are "covered by all sorts of regulation, especially if they sell alcohol, are in densely populated areas, allow children in, have unconventional opening hours or can be seen as health and safety risks" (Cloonan, 2011, p407). Although regulation can often be frustrating for music venues, it is occasionally necessary

and called upon by the industry. An example is The Agent of Change principle, a directive implemented in 2018, which stipulated that new buildings could not be erected near existing music venues unless appropriate soundproofing was installed (UK Music, 2018; Hanley, 2018).

According to Frith, the music industries have never required financial support from the government as market forces govern them. However, he does accept that popular music in the UK has "been shaped by indirect state support" (2005, p15). In the 1980s, cities such as Glasgow, Newcastle, Manchester and Liverpool provided opportunities for producing and consuming commercial music activities, including promoting concerts, training schemes, recording studios and music venues (Street, 1993). The municipal interventions indicate that "it is a healthy musical culture that leads to a flourishing music industry and not an investment in music industry infrastructure that creates a flourishing musical culture" (Frith et al., 2009, p80-81). The authors highlight three elements crucial for a healthy music culture to thrive: resources, spaces and time. Resources are regarded as music lessons, musical values passed on from family members, and access to recorded music either in physical or digital form. Spaces are both places to rehearse and venues to perform. Cloonan is specific in that it must include venues of all sizes without being genre specific. He also identifies recording studios, although they are less critical due to home recording technologies. The final element, time, regards musicians and the process of learning an instrument. Also included in this category are colleges and universities (ibid).

## A Comparison of Scottish and Welsh Popular Music Policies

The following section will explore popular music policies implemented by Scotland and Wales. Rather than highlight the transformations within the Scottish Ecosystem, a comparative examination will reveal Scotland's true extent of popular music policy. Scotland and Wales received devolution at around the same time from the UK. Although the Welsh population is slightly lower than Scotland, their industry structure is relatively comparable. As with Scotland, Wales does not have authority over broadcasting or intellectual property; however, Thomas and Carr (2022) believe that "Welsh policymakers do have the potential to influence the popular music experience in a number of ways" (p234). Behr and Brennan

acknowledge a similar line of thought; however, they are less optimistic, explaining that "Scottish popular music should be well resourced and established within policy considerations. The reality is less encouraging" (Behr and Brennan, 2014, p172). The literature will reveal a similar starting point for both administrations; however, a divergent path was taken over time.

### *Education*

The formational years of both administrations are not viewed positively regarding popular music policy. Cloonan explains that "policy in Scotland suffered from a lack of clear direction and a succession of ministers who have held the post for brief periods" (Cloonan, 2007, p123). The same sentiment was experienced in Wales, with Thomas and Carr noting that "direct references to 'music' within the Welsh Assembly itself were rare" (2022, p236). However, both administrations were prompt in their support of music tuition. Wales had developed the Music Development Fund (MDF) whilst Scotland produced the Youth Music Initiative (YMI), with Cloonan noting that "the initiative was a welcome one" (2007, p123). The YMI continues to succeed in Scotland, whilst the MDF only received ringfenced funds for four years. After that, it was left to local authorities to support music tuition, with Braithwaite calling it a "post code lottery" (2011). Whilst the YMI continues to be a success in Scotland, similar issues of access have been noted, with 70% of those learning instruments in School also contributing financially for additional lessons (Broad et al., 2019), which signifies that inequalities arise between those who can and cannot afford additional tuition. The situation in Wales has remained the same, with Carr noting that the lack of provision in some local authorities places responsibility for music tuition on the parents (2019, p7).

### *Music Heritage and Identity*

One distinction within policy analysis between Scotland and Wales is the significant use of policy to support the Welsh language. The Welsh Government has made it compulsory for all children to learn Welsh in school, whereas Scotland has not done so with Gaelic. Cloonan argues that Scottish identity can be expressed in five ways, "lyrical themes, use of voice, instrumentation, words and images" (Homan, 2016, p70). Within Scottish cultural policy, this is highly evident

in the traditional and folk genres (McKerrell, 2014, p162) and their continual economic support.

The Welsh Assembly embraced national heritage within culture policy by "providing recording opportunities for Welsh-language bands and artists and supporting them with their first releases" (Thomas and Carr, 2022, p237). The broader aim was to boost the use of the Welsh language with young people. However, this was not aimed at popular music, with Thomas and Carr asserting, "It is clear that it was considered to be valuable in its contribution to fostering the Welsh language, but perhaps also suggests that it was not yet being fully embraced as a sector of the creative industries" (ibid, p238). The promotion of music heritage and identity is evident in Scotland's annual SAY award. The event frequently has several popular artists nominated with worldwide coverage. Behr and Brennan assert that this type of promotion is part of the SNP's plan to "represent Scotland as distinct from the rest of the UK" (2014, p174).

### *Popular Music Investment*

Scotland and Wales have followed alternative trajectories regarding the direct funding of popular music. Scotland inherited the New Deal for Musicians (NDFM), which New Labour had initially introduced in 1999. The music scheme combined industry training with the freedom to pursue a career in music whilst claiming the equivalent of a job seeker's allowance. Although only utilised from 1999 until 2009, it has been described as "perhaps the single most important measure in popular music education we have experienced" (Jones, 2000, p6). It remains the most crucial attempt to support and develop popular musicians in Scotland.

Before the SNP gained a majority in Scotland, the Labour–Liberal Democrat coalition introduced the Futures Fund to assist in developing Scottish music businesses. The £500,000 fund offered grants of between £20,000 and £50,000. The intention was to grow audiences, increase revenue, and strengthen the overall industries; however, Cloonan believes that "its main success appears to have been in helping some businesses survive, not necessarily develop" (2016, p26). The consequence of this is likely why no significant investment has occurred in the Scottish music industries, with CS taking over all funding decisions shortly after the fund closed.

Wales was slow to introduce any discernible music policy. Only after a series of academic reports did the Welsh assembly implement change (Ap Siôn, 2009; Hargreaves, 2009; Carr, 2011). A critical review of their 2004 Creative Industries strategy led to policy reform within the popular music arena. Hargreaves noted that funding should "be designed in a way to ensure that it makes an impact on the music industry" (2009, p42). The Arts Council of Wales acknowledged the lack of direct music investment, noting, "It's an imbalance we wish to address. Our challenge is to find a credible and practical approach to the development of non-classical music" (2010, p29). Carr agreed that there was "room for improvement" (2011, p9), emphasising the economic benefits of popular music compared to classical or opera, which were already heavily subsidised.

According to Thomas and Carr, the incorporation of popular music into policy and funding discussions in Wales "demonstrated a significant shift, in which it embraced creative industries policy, and came to view popular music as both worthy and in need of support for the very first time" (2022, p241). However, within Scotland, popular music investment has been the primary source of support for promoting commercial music rather than providing any economic development plan. Cloonan emphasised this by explaining that "SE has suffered from the fact that it has no music policy per se. Rather, it has treated music as part of the creative industries more broadly and thus ignored the specialist requirements of the music sector" (2007, p133).

Whilst both nations applied the creative industries approach to policy, it is evident that Wales fully embraced the approach in an attempt to develop and grow the music industries across all genres, not just the NTCs. However, as Cloonan notes, Scotland requires more joined-up collaboration between agencies. Currently, policy decisions are related to the NPF outcomes, which restricts any real growth from occurring.

## Summary

It is evident that Scotland lacks any explicit popular music policies compared to a similarly positioned country such as Wales; however, that does not mean that the

SG or CS do not invest in popular music. On the contrary, youth music is a high priority, as is promoting the activities of Scottish musicians via the SAY award.

## How Should Music be Valued in Scotland?

The next task of the literature review is to investigate the value of music as a cultural good. Depending on its context, the notion of value can be challenging to translate. For example, different stakeholders value music differently depending on whether it is listened to, performed, or created (Ginsburg and Throsby, 2014). Frow (1995) made a similar assumption when he illustrated that different forms of value exist for different actors participating in cultural activities. However, the most applicable description comes from Throsby, who states that "value can be thought of as the worth, to an individual or a group, of a good, a service, an activity or an experience" (2010, p17). In this sense, it is clear that cultural goods have "value pluralism" (Kaszynska, 2020, p57).

## What Should be Valued? Culture or Industry Practice?

The difficulty of valuing music is its duality as two disparate activities. The two spheres provide this investigation with an additional layer of difficulty. First is the commercial market, where goods are purchased by consumers and the public domain, where the government deliver culture as part of policy initiatives or where individuals perform music for fun. Banks highlights this complexity, explaining that it is often unclear what should be valued: economic or cultural practices (2015). Consumers make value judgments based on aesthetic determinations. However, the government is frequently more concerned with themes such as "growth, employment, and branding value instead of traditional cultural themes such as education, empowerment, and enlightenment" (Bille et al., 2014, p238). Whether from a political or commercial perspective, it is evident that cultural goods can be valued in two ways: exchange value and use value.

## *Economic Value*

The economic valuation of a product or service originates in market-based transactions. Marx's Labour Theory of Value proposes that value comes from the labour time spent creating a product (1954, p47). Therefore, exchange value comes from the price of a product and not its use value. Classical economists understood value and price as separate concepts but found them hard to distinguish. In response to Marx and earlier classical economists, the Marginalists created a new theory based on supply and demand. The Marginalists perceived value and price as the same thing; however, they used the term utility to describe the intrinsic benefits of a good. In this sense, the product's price revolves around its value to the user and the benefits they gain from it (Elder-Vass, 2019). The notion of utility in modern-day neoclassical economics builds on the Marxist ideology of exchange value and includes the marginalist theory of individual preferences. In this context, Allan et al. believe value "derives from the subjective preferences individuals have over the goods and services they consume" (2013, p9). However, Snowball asks, "Does market value, for goods sold in the market, constitute a good measure of value?" (2008, p24). By employing price as a value measurement, she believes that cultural artefacts can be devalued and potentially damaged as society produces their valuation.

Using the example of recorded music, particularly in the last twenty years, it has decreased in economic value. From a neo-classical standpoint, the diminishing sales of physical music (and digital to a lesser degree) highlight the decline of utility derived from music as a listening activity. However, Marshall argues that music is not valued less due to its economic decline. Instead, social forces have altered how customers consume music (2019, p148). The devaluation of recorded music is a clear indicator that economic investigations of music activities could provide potentially flawed results when determining the value of music from an economic lens alone.

Additionally, there has been debate regarding the pricing of tickets to live music events (Courty & Pagliero, 2014; Leslie and Sorensen, 2014). The resale of tickets



from the primary market to buyers at a higher rate suggests that tickets are underpriced in the primary market. However, Magni (2023) argues that ticket prices remain low to attract customers, explaining that "the sales of ancillary goods – such as food, drinks, and parking – and complementary goods – such as records and merchandise – benefit from having a larger audience at the venue" (2023, p138). In this sense, both examples exemplify why valuing music using exchange value alone could potentially reveal flawed results.

### *Non-Economic Value*

The last twenty years have seen an increase in the debate around the value of culture, particularly in a political context, with the DCMS mapping specific creative industries to estimate their worth to the economy (2001). However, Banks believes "cultural value lies at the heart of cultural industries" (2015, p40). Numerous attempts have been made to identify and measure cultural value, most notably by Throsby (2001), Klamer (2003), and Holden (2004). More recently, the Cultural Value Project (Crossick and Kaszynska, 2016) attempted to identify what constitutes cultural value whilst identifying appropriate methodologies for research possibilities. Although there has yet to be a consensus on an applicable method in academic or political circles, the Cultural Value Project illustrated the need for both qualitative narratives to complement current quantitative reports.

The Arts Council of England (BOP Consulting, 2012) used techniques developed by cultural economists to estimate both economic and non-economic values related to culture. Historically, there have been two strategies: The Economics of the Arts and the Art and Commerce Approach. The Economics of the Arts approach uses economic analysis to investigate the arts. Decker argues that the technique "explores the relationship between the art world and the commercial or industrial world" (Dekker, 2014, p312). In contrast, the Art and Commerce approach "pays attention to both the intrinsic value of the arts and its instrumental value in society, and it is characterised by a holistic approach" (ibid, p314). However, a third technique, the "valuation approach", argues that cost is not an adequate measure of value. The new method concentrates on the role of cultural intermediaries. Dekker argues that they can "deal with competing notions of value, and perhaps, more importantly, have mastered the languages used to express such competing notions" (ibid, p319).

## Summary

The partner organisation for this thesis requested an economic estimation of the commercial music industries in Scotland; however, this section has illustrated why focusing on a financial figure alone could be problematic. It is also evident that attempting to estimate non-economic values, which are cultural, is also outside this project's scope. Therefore, it is evident that the Economics of the Arts approach is the most applicable method moving forward.

## How to Generate Money from Music-Making?

The following section will narrow the scope to explore how economic value is generated within a music economy. The analysis of value creation within the traditional music industry model historically occurred from a value chain perspective (Porter, 1985) with a linear tracking of economic activities focused on creating, producing, and delivering a tangible product. The value chain consisted of multiple stages, including song composition, recording, marketing and promotion, manufacturing and distribution, ending with the consumer (Bockstedt et al., 2006). However, introducing digital technologies has altered many of the traditional value-creating processes. A study by Peppard and Rylander investigated the issue of value creation in the mobile phone industry as it adapted to the effects of the internet, concluding that "due to digitalisation and dematerialisation of products, services, supply and demand, the Value Chain becomes inappropriate for analysing many industries" (2006, p128). Music was explicitly noted as an affected industry.

### *Monetisation*

"The music industry question is straightforward: how to make money out of music? But the answer is 'with difficulty'" (Frith, 2001, p26). Garofalo asserts that throughout the history of popular music, "the goals of the music industry have remained essentially the same: to connect music, but not necessarily musicians, to as many listeners as possible and to turn a profit in so doing" (2015, p103). Bruenger expands on this point, claiming that it is not only a connection which is important but also providing a "musical experience" (2016, p8). Once the

connection is made, revenues can be generated from the three core sectors of music activity: Live music, recorded music and music publishing (Jones, 2012; Rogers, 2017; Hesmondhalgh, 2019).

A component of the value creation process, which is often overlooked within the literature, is the role of the music creator, with Eiriz and Leite arguing that "in spite of their importance, it is strange that business and management studies have neglected the study of musicians as actors of major economic importance" (2017, p877). Choi and Burnes (2013) suggest that value creation occurs when a songwriter composes a piece of music, although that statement is only partially accurate. The music creator has created a symbolic text; however, that does not indicate that it is yet valuable. Jones argues that "it is important to recognise that musicians seek music companies to add value to what they already do" (2012, p4), which is the basis for value creation.

Bruenger maintains that there are four methods to monetise music across the three core sectors: "sales, subscriptions, advertising and licensing" (2019, p109). Sales are linked to physical items such as vinyl, merchandise, and tickets to live performances. Subscription revenue comes from platform-based access to recorded music from companies such as Spotify or Apple Music. Advertising income is generated from broadcast radio; however, it is also prevalent with YouTube and Spotify's freemium membership. Licensing is linked to copyrights and their exploitation across recorded music and publishing.

Although the original value chain was utilised to illustrate the movement of value associated with recorded music, a contemporary music value chain, presented by Vasquez (2017), developed the original concept to include publishing and live music. Although this is more applicable to the movement of value in the current global music industries (UK Music, 2021), the concept does not consider the myriad of intermediaries operating within additional business sectors. Norman and Ramirez argued this point when they proposed that value creation occurs through a "co-production with suppliers, business partners, allies, and customers" (1993, p66).

## *Value Chains to Value Networks*

Allee (2000) believes that the value network can replace the value chain as it helps address value creation issues within the context of the knowledge economy. Allee asserts that a value network is "any purposeful group of people or organisations creating social and economic good through complex dynamic exchanges of tangible and intangible value" (Allee, 2009, p429). According to Walton, Networks are more appropriate than value chains from an information science aspect for two reasons. First, networks are ideal for the flow and exchange of information. As ideas are shared, the information is synthesised into new, novel concepts. Second, value creation is delivered as a result of information and new ideas (Walton, 2017, p45), a concept further supported by Lusch et al. (2010).

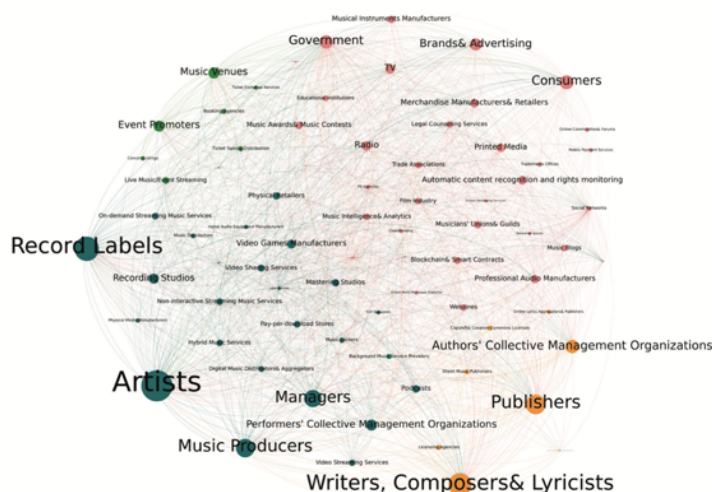
Allee developed a model to analyse value creation with any company business, organisation, or network. The Value Network Mapping (VNM) concept can be used as the basis for a complete Value Network Analysis (VNA) or as a stand-alone process. The map has a straightforward design with only three components: roles, transactions, and deliverables. Roles are taken by participants who have a vested interest in the network, such as "individuals; small groups or teams; business units, whole organisations; collectives, such as business webs or industry groups; communities; or even nation states" (Allee, 2008, p14). Transactions are the exchanges between actors with arrows displaying a directional link that depicts the direction of the value transaction. There are two types of exchange, "solid lines are formal contract exchanges around product and revenue, while the dashed lines depict the intangible flows of market information and benefits" (ibid). Deliverables are exchangeable as both tangible and intangible goods between the different roles. Tangibles are physical goods, whereas intangibles can include "a specific type of knowledge, expertise, advice, or information about something, or a favour or benefit that is bestowed upon the recipient" (ibid). In order for the VNM to be successful, Allee and Schwabe (2015) indicate four key steps:

1. Define the scope and boundaries, context, and purpose.

2. Determine the roles and participants and who needs to be involved in the mapping.
3. Identify the transactions and deliverables, defining both tangibles and intangibles.
4. Validate that the map is complete by sequencing the transactions.

The notion of commercial music activities as a series of connected networks gained prominence with Leyshon (2001). Building on the work of Attali (1984), he identified four overlapping areas of activity: creativity, reproduction, distribution, and consumption; however, this was restricted to the recording sector, negating live music or publishing activities.

Vasquez developed Leyshon's work and created a value network model that analysed the Norwegian music industry. To encapsulate the digital transformations which have taken place, his model includes tangible and intangible exchanges of value amongst all invested stakeholders. Tangible transactions include "the exchange of physical goods, services, intellectual property, proposals, and payments". In contrast, intangible exchanges include "planning and process knowledge, technical and legal know-how, and strategic information" (Vazquez, 2017, p29).



Although this model appears suitable for analysing value creation, it does not include critical stakeholders who operate outside the business domain of music.

## *Value-creating Ecosystems*

It is necessary to emphasise that value creation is not only possible from core business activities; it is also feasible from stakeholders from additional sectors, with Rogers suggesting that "analysis of the unfolding relationships between the core music industry subsectors (recording, publishing, live) and the network of ancillary services surrounding this core, points to a fundamental reconfiguring of the music industry's structure and organisation" (2017, p218). Management literature offers a functioning model from Moore (1996), who introduced the concept of a business ecosystem as "communities of customers, suppliers, lead producers, and other stakeholders interacting with one another to produce goods and services" (Moore, 1998, p168). Alongside the core business activities, Moore argues that the government and investors should also be included as they can create value across the ecosystem. The notion of including government activities will be vital to this thesis as, within Scotland, they provide high levels of funding and regulatory assistance.

Tang and Lyons (2016) successfully applied Moore's Ecosystem Model (1996) to the Chinese Music Industry to understand the developments since digitalisation. Although the Chinese music market continues to utilise a linear value-creating strategy, the authors contend it does not consider the "entire universe of important forces at work" (Tang and Lyons, 2016, p352). Therefore, the authors propose a new ecosystem model that features the old value chain model, suggesting it would operate within "a community of players from different industries and backgrounds" (ibid, p367). Letaifa (2014) agrees with Tang and Lyons, arguing that value creation and value capture from chains and networks to an ecosystem perspective is based on a new multi-actor approach. In this sense, value has become more "knowledge-based, social, subjective, intangible, and complex" (2014, p279).

Technology has played a substantial role in the move to ecosystem thinking. Walton believes this is predominantly "the result of new technologies in the ICT sector including the Internet" and "the increasing digitisation and de-materialisation of products" (Walton, 2017, p86). As music has increasingly become an intangible product, technology has allowed participants from other industries to enter the music ecosystem and drive change. Applying an ecosystem perspective to value

creation is critical as it will provide a broader examination of the conditions necessary for the successful operation of the music industries in Scotland and the value creation activities which occur. The ecosystem viewpoint for value creation is also consistent with the broader theoretical approach chosen for this thesis by Becker (1982). His Art World hypothesis posits that art (songs, paintings etc) are not created in a silo but rather by a collection of individuals who come together to bring the artefact to the public for consumption.

## Summary

The literature has demonstrated that music has the potential for valuation from more than an economic lens. However, in line with the partner organisation's request, that is what will be provided. Popular music has historically been examined regarding the sale of physical records using a value chain approach. However, that is not an appropriate method in the digital age because of this project's scope. Therefore, the literature has identified an ecosystem model as a suitable method to incorporate all the relevant sectors into one analysis.

## Textual Analysis of Previous Mapping Reports

This literature review section will investigate mapping studies, revealing why they are helpful and identifying who uses them. Section two will analyse mapping reports from different music industries to identify which approaches have been used, the best methods available, and how to implement them.

## Introduction to Mapping

The notion of mapping an industry to assess its economic value first rose to prominence in the late 1990s with Tony Blair's Labour government. The intention was to highlight the Creative Industries' economic worth to boost funding and drive the government's economic agenda through cultural policy. Within the literature, two distinct mapping types are identifiable: mapping reports and pictorial maps, although these can overlap and complement one another in some instances. Depending on who is undertaking the activity, the motivations to create these can

range from economic to social and cultural. A mapping toolkit commissioned by the British Council (BOP Consulting, 2010) identified five possible reasons for creating a mapping report:

1. To raise the profile of a specific sector
2. To learn more about a chosen sector
3. To plan for future growth
4. To engage in policy discussions
5. To support broader political or economic objectives

Another possible reason for mapping is presented by Stewart, who believes that maps help draw "attention to the existence and importance of cultural resources. The results point out problems to be solved or strengths to build upon" (2007, p3)

Behr (2013) identified three groups responsible for producing maps: academics, artists and communities, and commercial groups. For academics, mapping is helpful as a practice and a tool, with Behr explaining, "(t)hey are an object of investigation, a method of investigating, and also a way of presenting research results" (ibid). The second group, artists and communities, can be demonstrated by analysing the Seattle band map (Berry, 2011). The pictorial map was originally a piece of art identifying musicians and bands across Seattle; however, it expanded after receiving funding to transform it into a digital interpretation. Although similar to Academic mapping, this type is grounded in cartographic presentations rather than investigating a particular issue. The Seattle map successfully generated cultural value through its exhibit of musical heritage in the same manner as Sara Cohen's pictorial maps of Liverpool (1991; 2012). The final type of mapping identified by Behr is commercial. The most helpful example of commercial mapping comes from UK Music, an organisation representing the coordinated interests of the UK's music ecosystem. Although UK Music produces "This is Music" (Edwards, 2021), a report highlighting the economic worth of the music sector in the UK, they also promote music heritage and the benefits of music tourism to other sectors of the economy.

Redaelli (2015) identified three mapping practices; however, she has done so from a policy perspective to illustrate the various purposes of mapping from a government position. First, mapping to quantify the economic worth of a sector is



the most widely accepted purpose for most reports. The second type is mapping as a geographical analysis tool. By applying this analysis, policymakers can identify how the arts are integrated into specific geographical areas. There have been a number of examples of this in the UK already, from Cohen (2012), who mapped music making in Liverpool, and Hamilton (2020), who mapped lived music venues in Birmingham. The final type of mapping is network analysis. Using social network analysis, a map of activities between individuals and businesses can identify the creative process within a chosen sector, ultimately helping to identify the strengths and weaknesses of the sector under review. The three approaches align with traditional mapping reports (Williamson et al., 2003; Ekos, 2013; Vazquez, 2017) based on economic estimations and network analysis, the partner organisation's two key aims for this project.

Both taxonomies reveal that mapping, particularly relating to cultural activities, is essential for industry professionals and policymakers to investigate cultural activities. Most mapping reports are concerned with a sector's economic output to influence policy decisions at local and regional levels (Lee and Gilmore, 2012); however, they can also produce additional data to analyse the strengths and weaknesses of a chosen sector to promote growth.

The literature so far has demonstrated the uses and effectiveness of cultural mapping to achieve specific outcomes depending on the project's aims. However, the specificities of mapping music industries have thus far received little attention.

## Mapping Examples

As this research is both an academic thesis and a commercial project with the partner organisation, the following section will analyse previous academic and commercial maps. Perryman believes that the quality of a mapping report "depends on objectives, so it would help a great deal to read similar published reviews before getting started" (2016, p81). Therefore, by examining previous research, several methodological options will become clear.

### *Mapping and Measuring the Scottish Music Industry (2003)*

The earliest examples of music industry mapping in Scotland come from The List (1990) and Music in Scotland Trust (1994). Dave Laing (2000) produced the first Scottish economic mapping report, *The Value of Music in Scotland*. He estimated that for 1998/99, Scotland generated around £389 million from domestic activity, around 10.4% of the UK expenditure at that time. Laing's work laid the foundations for the most comprehensive music map, published in 2003.

*Mapping and Measuring the Scottish Music Industry (2003)* was a report commissioned by Scottish Enterprise (SE) and produced by academics John Williamson, Martin Cloonan and Simon Frith. SE provided a remit to "update their information on music industry trends in Scotland" (Williamson et al., 2003, p1). In conjunction with SE, it was agreed that the report would include a collection of case studies and stakeholder interviews featuring key industry figures that would complement an economic evaluation of the Industry within Scotland. All parties concluded that the vital economic areas worth exploring would be Artists and Composers, Live Music, The Recording Industry, The Media, Other Creative Industries, Ancillary Services, Education, and Retail (Ibid, p1-3). Although the remit of SE was economic development, the authors believed this would only partially represent the overall sector. Cloonan et al. explain that "any understanding of the Scottish music industry and its problems had to be cultural" and "had to appreciate the values and beliefs of the people who work in it" (2004, p207-208).

Most of the work executed for the report was desk-based and utilised "existing information by reviewing previous surveys and material held by Scottish organisations" (Ibid, p207). This gave the authors a great deal of data to work with and revealed gaps that they counteracted by using their contacts within the Scottish industry. Critical issues identified included defining the music industry, constituting employment within the sector and identifying which businesses represent the music industry (Williamson, 2003, pi). Although this type of report can be problematic regarding methodology, the authors anticipated these issues and were transparent with their approach and shortcomings. Cloonan et al. explain, "From the outset of our research, we were aware that even the most basic

assertions about economic activity in the music sector are subject to dispute and interpretation" (2004, p207).

The final report highlighted several areas worthy of praise, including the generation of around £106 million in services from music sales; however, the authors recognised that the figure could vary from year to year. There was also the contribution of £18.8 million to the broader economy in Scotland and £330.9 million spent on musical instruments and attending live music events across the country (Cloonan et al., 2004, p208). Cloonan reflects on the experience, revealing that although SE did not try to interfere with any findings, they "did want to ensure that in any summary our findings were spun so as to support SE's existing policy initiatives" (Ibid, p211). Although the data was not modified, it is clear that SE did not receive the report they had wanted. That is not to say the report's findings were incorrect. Due to my professional association with the Scottish music industries, I would suggest that many key points remain relevant today. These include a lack of distribution opportunities, a lack of investment in (popular) artists from public bodies, and geographical barriers for those outside the central belt.

Cloonan et al. note that "almost as soon as the report was published, there began to be whispers that it was full of mistakes" (2004, p211), which led to its eventual removal by Scottish Enterprise and The Scottish Music Centres websites. The report emphasises the necessity for a clear understanding of what will be delivered between the author(s) and the report commissioner. The report also reveals that trying to sum up an entire industry when individual areas have diverse requirements is challenging.

#### *The Danish Recorded Music Industry Annual Mapping (2005)*

2005 saw the publication of a Danish mapping report to identify areas of prosperity and potential restrictions to economic growth (Fuglsang, 2005). The methodology was quantitative, with desk-based research collating secondary data from online statistic sites such as 'KODA', 'the Association for Composers' and the 'IFPI'. The authors separated the industry into three sections: main activities, related activities and related industries. Main activities are described as those who make a living from creating art, in this case, a musical artefact, such as songwriters, managers,

live performers and recording. Related activities tie in with those dependent on music creation, such as photographers and the media. Finally, related industries can exist without music but use it to their advantage, for instance, advertising and music in movies. The author focused solely on the main activities section "as these are central for the development and creative dynamics of the industry" (ibid, p12). The report was created primarily for the Danish government as a "policy memo" (ibid, p3) alongside similar reports for other creative industries, which is reminiscent of the UK sector mappings (DCMS, 1999; DCMS, 2001).

The Danish model highlights a variety of income sources, such as record sales and total industry turnover. In this respect, it is less inclusive than the Scottish map. That is not to say the Danish data is weak. Instead, due to the government's coding of economic sectors using the NACE framework, the Danish industry appears more streamlined in mapping cultural activities economically (Fuglsang, 2005, p12). However, the research was "complicated by the lack of precise data" (ibid, p4). The UK uses standard industrial classification codes (SIC) similar to Denmark's NACE classification; however, the UK system was initially based on the manufacturing industry and, in that respect, archaic and outdated (Behr and Brennan, 2014, p175). Sourcing reliable economic data that has not been collected via primary research remains a constant problem in music mapping reports. The Scottish and Danish maps apply the same method of desk-based research to gather economic data from secondary sources such as government documents and existing survey data.

The classification of sectors and examination of economic activity is far more detailed in the Scottish report (Williamson et al., 2003) than the general overview of the figures given for the entire industry within the Danish report. The Scottish and UK maps are far more comprehensive in that respect.

### *Music Sector Review (2013)*

The 'Music Sector Review' was published in 2013 by EKOS after commissioning by Creative Scotland (CS). Ekos is a group of independent consultants specialising in social and economic research within the creative sector and the broader economy. The report's objectives were to give "an overview of the cultural ecology of music; inform Creative Scotland's future priorities and provide a basis

for strategic commissioning of external entities to provide service provision which could replace and/or complement existing programmes and services" (Ekos, 2013, p3).

The overall remit was radically different from the previous mapping investigation. Martin Cloonan, the co-author of the 2003 report, believes "the intention was not a mapping in terms of an economic analysis which produced an overall value of the sector, but rather a map of the extent of the music sector which also outlined both its strengths and areas for concern" (2013, p321). Once again, as with the previous report, Ekos acknowledges the challenge of defining the music industries. Based on the remit provided by CS, the authors identified three areas for analysis: live music, the recording sector and music education (Ekos, 2013, p5).

The methodology was similar to previous reports, with qualitative and quantitative data collection. The creation of a steering group began before research had commenced. The main aim of this was to oversee the project and finalise the remit from CS. The group had three meetings, analysing the initial findings and giving feedback for future recommendations (ibid). Members of the steering group were invited by email, with Simon Frith and Martin Cloonan invited to join following their involvement with the previous 2003 report. Desk-based research identified the industry's current state by analysing online secondary data from sources such as PRS and PPL. A series of individual and group interviews occurred with amateur and professional musicians from a pool of 99 participants.

Finally, a questionnaire was posted online and promoted by CS and the Scottish Music Industry Association (SMIA) (ibid). The data collected from individuals covered annual earnings, sources of income, how respondents felt the industry was performing, and the key issues they faced. A second questionnaire was created to collect additional data from organisations, such as annual turnover figures, types of businesses, sources of income, and how strongly they felt the industry was performing.

Likely, the inclusion of a steering group to guide and inform the review may have been a precautionary measure in an attempt to counteract the negativity encountered by the 2003 Scottish mapping report (Cloonan, 2013, p323-324). However, the steering group was not as independent as initially

believed. Cloonan explained, "of the eight people at this meeting, two were from Creative Scotland and two were the consultants they had commissioned" (Ibid, p325). There could have been an underlying element of bias here, similar to the situation with SE trying to promote their agenda with the delayed release of the 2003 report. However, Cloonan believes this was likely due to problems with "regular attendance" (ibid).

### *The Music Industry in the Dawn of the 21st Century (2017)*

The next report comes from Norway and summarises the Norwegian music industry by administering a structural analysis and mapping of the sector. Published in 2017, Vázquez critiques the industry's previous value chain model as being "outdated" and proposes a new value network model. Within this value network, value is no longer created linearly. Instead, Vasquez contends that a music ecosystem can be considered "a web of specific investments built around a critical resource" (Vasquez, 2017, p19). The one factor that has not changed between models is the place of the artist/songwriter, whom Vasquez believes is at "the centre of a network of cooperating people" (Ibid, p7). Although a seemingly obvious concept, this is the first report explicitly stating the importance of music creators.

The report identifies three core musical groups that make up his concept of a value network industry: the recording industry, publishing, and live music. Additionally, stakeholders circle these key groups and operate peripherally (Ibid, p30). This approach has more of a traditional industry feel than previous reports; however, the Norwegian industry has major labels operating within its economy compared to Scotland, which does not. The three majors, Sony, Universal and Warners, have offices in each Scandinavian country that release music from domestic and international artists. Autonomy of this kind allows for the growth of local talent while promoting more prosperous international artists.

One essential discussion exclusive to this report is the concept of value, which relates to the value network model.

"(T)he key question we need to deal with is the meaning of "value" within the network: Is there only one type of value, or do different stakeholders perceive

diverse types of value? How are these distinct types of value created within the network – what actually moves the production system? – and how does each stakeholder contribute to it?" (ibid, p23)

This report was the first time an analysis had occurred analysing the concept of value within the broader musical landscape regarding creation and extraction. The methodology adopted for the Norwegian study involved both qualitative and quantitative research, applying desk-based research and interviews with stakeholders. The data demonstrated the industry's value and revealed the interactions of each stakeholder. The stakeholders also revealed whom they valued most within the value network and who was most important to developing their business model (ibid, p43).

### *Music by Numbers (2019)*

UK Music publishes an annual report on economic growth across the UK music sector. Previously titled 'Measuring Music', the report was published from 2014 until 2018, when it changed its name to Music by Numbers. The newest report has mapped the primary industry sectors as music creators, music retail, recorded music, music representatives, music publishing and live music, and an additional, independent section for music tourism. Within these sectors are various sub-sectors, which UK Music classifies as the core of its commercial assets. The first asset is a composition or lyrics; the second is a recorded piece of music based on composition. The third is a live performance; the fourth is the band or artist as a brand (UKMusic, 2019, p8).

A critical addition to this report is the music tourism perspective, which continues to positively impact local economies (UKMusic, 2017; van der Hoeven et al., 2021). The report has representative data for each region reporting on employment figures, the number of jobs, and tourists. Scotland saw the most significant increase in tourism after an improvement from "800,000 tourists in 2017 to 1.1 million in 2018, a jump of 38%" (UKMusic, 2019, p24). 'Music by Numbers' is the only report that publishes an independent methodology. UK Music began by defining the industry and identifying the economic sources of domestic and foreign income. The data collection process includes UK Music members, industry bodies, and the Annual Business Survey, as the SIC codes are inadequate in some

respects for attaining realistic musical income measures. Surveys were designed and dispatched to workers who contribute economically to music for employment figures and export revenues. UK Music reported challenges within the methodological framework concerning three areas: defining the music industry, collecting reliable data, and using the data correctly to assess the economic impact of music activities (UKMusic, 2019).

The report intends to emphasise the economic benefits of the UK music sector, which is evident in the chosen sectors. The report does not mention music's social or cultural benefits; however, the report is prepared with the agenda of influencing policy within the UK government (UKMusic, 2019, p28). The omission of music education further illustrates the economic intention of the research. It is clear that the report was created to boost the profile of the music sector in the UK; however, it provides no data specific to each member nation.

## Summary

To summarise, none of the five reports approached their mapping activity similarly. However, this is likely due to the conflicting requests of who commissioned the work. It is also evident that no two countries have similar structured music industries, which complicates the mapping process.

The methodology has a more precise connection amongst maps with desk-based research applied by all reports. Additional data was then collected using surveys and interviews with industry stakeholders; however, interviews came from the need to collect more than just economic data, in the case of the 2003 Scottish map.

Moving forward, it is evident that the current research will require a combination of methods as it is both a mapping and measuring study. A combination of qualitative and quantitative data will illustrate the economic value of the music ecosystem in Scotland whilst offering a cultural overview of music activities. The current map will be distinct from previous maps as it will incorporate direct economic sectors and those operating on the periphery of the music sector.



## Cultural Intermediaries in the Digital Age

This section of the literature review will briefly investigate cultural intermediaries, arguing that they are critical agents who occupy positions between the creation and consumption of music.

Becker called these roles "support personnel" (1982, p30); however, Bourdieu's notion of cultural intermediaries (1984) remains a more relevant theory as it discusses not only roles and conventions but also the value-generating capabilities they inherently possess. The term was first used to describe a group of middle-class workers who presented symbolic goods and services, linking production and consumption. The first iteration focused on agents who reviewed cultural goods, such as journalists, with Bourdieu explaining that their purpose was to "perform the tasks of gentle manipulation" (ibid, p365) to promote the goods to individuals with similar tastes.

Negus builds on the original theory by Bourdieu, incorporating elements of his habitus theory by explaining, "entry into these occupations is usually via networks of connections, shared values and common life experiences. Gaining access to work is less dependent upon a meritocracy or assessment and recruitment according to formal qualifications" (2002, p515). Additional research by Negus (1992) revealed that similar class groupings were distinguishable when analysing critical decision-makers in the British recording industry. These comprised white males from middle-class backgrounds with the privilege of private education. Negus notes that for a sector often considered liberal and easily accessible, there have historically been "strategies of class exclusion" (ibid, p16).

Although there is no definitive list of cultural intermediaries or their functions, Fairchild (2014) outlines a taxonomy exclusive to the music industries based on five categories:

1. Live music firms: venue operators, live music promoters, and impresarios.
2. Agents involved in the sound of the music product. Managers, record producers and anyone who operates between the record label and the artist.

3. Agents involved in the music artefact. Record label employees, Music publishers, Lawyers, and political operatives involved in funding and trade organisations.
4. Those who present music to the public including marketers, tastemakers, retail buyers, radio broadcasters and music supervisors. These occurrences will always be beneficial to the artist.
5. Agents who write about music, such as bloggers, critics and social media operatives.

The intermediaries proposed by Fairchild have several roles, which include "finding music to bring to the market; making sure that music is in some way acceptable to facilitate the construction and exploitation of that market; making sure that music can be heard in the right places at the right times and can move through the right channels in the right ways; making sure consumers recognise "their" music when they hear it; and making sure the right people get paid in the right way to ensure this process is sustainable and increasingly profitable" (2014, p130). Although Fairchild's interpretation is more advanced than Bourdieu's, the basic premise remains. As this thesis aims to promote a broad analysis of the music sector, it is vital to incorporate the economic, social, and technological advancements which have taken place since Bourdieu's original concept. Following the musical artefact from conception to consumption via cultural intermediaries will allow an analysis of the interactional dynamics between the sectors chosen to map the Scottish music ecosystem. Cultural intermediaries can also shape consumers' perceptions of value, whether a musical artefact or a live performance. Such notions of value extend beyond economic to include social and cultural value, which will be explored in more detail in chapter six (Matthews and Smith Maguire, 2014, p10).

## Conclusion

This chapter has investigated what is already known about the music industries in Scotland from both a commercial and public perspective. While the literature on public funding is widespread, previous economic mapping data is almost twenty-one years old, highlighting the necessity for a current investigation.

Whilst there is a broad range of literature regarding cultural policy in Scotland, there has yet to be any research on the effects of the pandemic on Scottish popular music, which is a clear knowledge gap. By analysing the literature, the first aim of this thesis is to investigate cultural policy decisions implemented as a result of the pandemic, with particular attention given to the impact on cultural workers.

The second section indicated that economic value is not the only type of value within commercial music sectors. However, that is not to say that revenue is not critical. Whilst the value chain model was illustrated as outdated, chapter six will investigate value creation from an ecosystem perspective, revealing how intermediaries and consumers are implicated in creating value due to new digital technologies. The second aim drawn from the literature is to examine notions of economic, social, and cultural value, with a strong leaning toward exploring the production of economic value among music creators and cultural intermediaries.

The third section of the literature review analysed cultural mapping as a tool, identifying its uses and potential outcomes. Analysis of previous music maps identified the trend to determine their economic worth, which began with the DCMS mapping (1998). However, Williamson et al. (2003) recommend that any economic mapping of cultural activities also incorporate an element of cultural investigation. Further examination demonstrated various ways to group sectors and illustrated several methodological options. Although UK Music provides UK-wide data, they do not deliver economic figures for Scotland, assuming that the industry mirrors that in London. Therefore, the final aim drawn from the literature is to map the Scottish music industries and identify their strengths and weaknesses.

The final section demonstrates the role of cultural intermediaries, illustrating their significance to music economies. It was noted that cultural intermediaries can generate and shape notions of value; however, there is no data relating to the Scottish context. Therefore, by applying Bourdieu's notion of Capital (1986), value creation will be examined by investigating economic, social, cultural, and symbolic capital within the Scottish music industries

## Chapter Three: Methodology

Initially, this thesis aspired to map the current Scottish music industries and measure the social, cultural and economic value generated by its activities. Ultimately, the research aims were impacted by the Covid-19 pandemic and the subsequent lockdown measures. Therefore, my supervisors and I decided to realign the research aims to incorporate the ongoing pandemic and understand its impact on the music industries in Scotland. The research applies a mixed methods approach by utilising desk-based research, an online survey and semi-structured interviews with cultural intermediaries across the Scottish music sector. By applying Kipling's "practical template", as discussed by Trafford and Leshem (2008, p90-91), the "what, why, when, where and who" will be utilised within this chapter to portray a more precise depiction of the research design.

The following chapter will explain the research tools employed during the data collection phase and describe how this process was carried out. The primary research period began in August 2020 and concluded in early 2023. Secondary data collection was an ongoing process employed to collect up-to-date financial and sectoral data. The quantitative element had two parts: an online survey using the University of Glasgow's Jisc Online Survey tool and collecting economic data regarding the music industries economic worth for 2018. Qualitative data collection involved semi-structured interviews with cultural intermediaries within the Scottish music sector. Semi-structured interviews provided an in-depth analysis of specific industry sectors, allowing a deeper understanding of how they interact with each other and revealing the challenges they face on a day-to-day basis.

The subsequent six sections will outline the research strategy adopted for this study. Section one illustrates the researcher's involvement in the Scottish music sector and offers a positionality statement. Section two explains the research aims and briefly overviews the study. Section three identifies the chosen research approach and the underlying theory. Section four offers definitions and the scope of the research. Section five details the data collection methods and examines the research strategy. The final section addresses the ethical implications of the study.

## Personal Involvement

Before re-entering academia as a mature student, I was fortunate to receive moderate success with my band, Glasvegas. Upon signing a record contract with Columbia Records, my experience within the world of music began, which resulted in my exposure to numerous aspects of the music industries both in Scotland and internationally. The knowledge and experience I have gained from recording, releasing and touring music has been critical to this research.

Upon returning to higher education in 2016, I found my interests leaned towards the Scottish music industries, how the various sectors functioned after introducing new digital technologies, and the well-being of musicians on tour. My practical experience and academic background have placed me in a unique position to perform this research as an insider within the industry. According to Tashakkori and Teddlie, you should “study what interests you and is of value to you, study in the different ways in which you deem appropriate and use the results in ways that can bring about positive consequences within your value system” (1998, p30). My experiences led me to this project, which I discovered through the Scottish Graduate School of Arts and Humanities (SGSAH). Funded by the Arts and Humanities Research Council (AHRC), I was awarded a Collaborative Doctoral Award (CDA), a partnership between The University of Glasgow and The Scottish Music Industry Association (SMIA), a membership organisation tasked with developing and representing the Scottish music industry. The concept for this project came from the SMIA after consultation with their members. Although the initial proposal came from the partner organisation, I was granted the freedom to conduct the research I wanted as long as it met the demands of the SMIA.

The application process for my CDA involved a statement on the issue of impact and what contribution could be to the broader music community as a result. The purpose of research at the doctoral level has been to provide new knowledge within the chosen discipline of study. However, Belfiore has drawn attention to the desire of governments for research to have more than just academic impact, with the current aim to achieve social goals and create public value. Belfiore continues that academia and the cultural sector adopt the term and ideology of impact as “it

appears to offer a rhetorically powerful articulation of value and an attendant rationale for funding” (2015, p101). Therefore, this thesis intends to build on existing academic knowledge and impact the lives of musicians and those working in the broader music industries in Scotland by assisting with future policymaking.

Although academics strive to transfer their knowledge to specific work sectors, they often come up against what Williamson et al. call “knowledge resistance” (2011, p470). The term can refer to knowledge which readers disagree with in many cases. However, for Williamson et al., the findings highlighted a lack of value and inequalities within the Scottish music sector, which appears to be the primary reason for negative feedback. Consequently, I find myself in the unique position of being both a doctoral researcher and a member of the music community in Scotland, allowing me to bridge the gap between academia and the music industries.

## Statement of Positionality

Conducting this research has required me to reflect on my experiences as both a musician and a researcher. Undoubtedly, much of the upcoming chapters are rooted in my experiences and informed by my views and opinions; however, that is not to say that they have been written with any sense of bias. The following section will offer insight into my position as a researcher within this project.

I was raised in the East End of Glasgow by a single parent and will comfortably acknowledge that I was part of the lower working class. Whilst there was no discouragement at home, the idea of becoming a musician was mocked when I told my career advisor. As far as my school was concerned, becoming a musician was only possible within a classical music setting. Cultural work literature has noted that entering creative occupations can be challenging for the working class (Negus, 1992; O’Brien et al., 2016; Banks, 2022; Brooks et al., 2023). Whilst this was undoubtedly the case for me, it was primarily due to time and a lack of financial support. I did not have the economic backing of a wealthy parent; therefore, I had to work full-time and create music as a side project. It only became apparent that my own experience was rare once I left Scotland and began interacting with various artists and cultural workers globally. Whilst this could have

impacted my views on specific individuals, my history working within the global music industries has taught me that whilst some people may have it easier in some respects (finance, access, contacts), having a successful career over a prolonged period remains challenging for everyone regardless of class, ethnicity or gender. It is also worth noting that whilst I feel there should be more support for working-class music creators and cultural workers (Banks, 2022; Tapper, 2022; Wray, 2024), Scotland has a notable number operating within the upper levels of several sectors.

The starting block for this research began with a Scottish music industry mapping study from Williamson et al. (2003). The report was the most extensive investigation of the Scottish music industries to date, providing both an economic estimation of its business activities and a cultural examination. However, a mapping report from Norway (Vazquez, 2017) offered an expanded analysis of various types of value and how value creation occurs, which is highly relevant to the current study. Finally, UK Music has provided a current perspective on the music industries in the UK, particularly with reference to mapping sectors and their economic estimations (Edwards, 2021; Edwards, 2022). Many of the core decisions from this thesis have been informed or inspired by the works mentioned above.

I will now position myself within the research using a framework by Savin-Baden and Major (2013; Holmes, 2020). First, I will locate myself within the topic. As I have briefly touched upon, I have worked professionally within the Scottish music industries since 2006. My role as a guitarist has given me a perspective that varies significantly from those in other sectors. My choice to write the thesis from a music creator's perspective may seem biased, but this decision was suggested before I joined the project. However, for clarity, I believe this was the most logical stance to adopt.

Second, regarding research participants, I used my personal knowledge to create a list of those I thought would offer the most insight. I presented the list of suggestions to the SMIA. Although they agreed with many of my recommendations, it was clear they wanted the research to take a more high-profile approach, particularly with the attainment of Music Creators. I was acutely aware that a high percentage of those I wanted to interview would have

had significantly different experiences from myself regarding entry to a role in music due to several personal circumstances. Many of those interviewed I knew personally or had heard about in music circles, as the network in Scotland is relatively small. Whilst this could have been viewed as a negative, I feel this was actually to my benefit, having worked in the research context for a considerable period. Hurst (2015) argues that coming from the same working-class background as those interviewed helps to cultivate trust. I would extend Hurst's argument to include working in the same industry and facing the same issues. By positioning myself as an insider (Rowe, 2014), I was able to collect a rich source of data, which was invaluable to the study.

Finally, the research process. I made no secret to anyone involved in the project of who I was and what I was seeking to achieve. Undoubtedly, my position within Glasvegas may have impacted the data offered by participants in order to portray themselves positively or in a specific manner. The COVID-19 pandemic certainly had a substantial impact on the data collection and interview process. Everyone I interviewed was concerned about their business, the businesses of others, and/or the overall music industries. As a result, it was sometimes challenging to dissect whether people were unhappy with certain elements relating to before or as a result of the pandemic. The synthesising of data was fairly straightforward as I took a stern, reflexive approach to keep my personal experiences and emotions out of the equation. A number of times, I had to question why I had negative feelings on certain topics, which helped me to identify potential biases, which were then removed from the findings section. Many of those times related back to my earlier discussion of access to music and opportunities, which can, at times, be dependent on location, class, social group, ethnicity and gender.

## Research Questions

Two research questions were formulated based on initial meetings with the partner organisation (SMIA) and my supervisors.

1. What was the economic value of the Scottish music industries in 2018?



2. How has the pandemic disrupted the Scottish music industries, and what are its vulnerabilities to disruption?

In order to answer the research questions, three key aims were constructed by analysing the literature.

1. To map the Scottish music industries and identify their strengths and weaknesses.
2. To examine notions of economic, social, and cultural value, with a strong leaning toward exploring the production of economic value among music creators and cultural intermediaries.
3. To investigate cultural policy decisions implemented as a result of the pandemic, with particular attention given to the impact on cultural workers.

An explanation of how these questions were addressed based on methodological choices will now occur.

## Research Design

An explanation of the research design will now be presented, with a mixed-method design chosen as the most appropriate strategy. Johnson et al. describe mixed methods research as “an approach to knowledge (theory and practice) that attempts to consider multiple viewpoints, perspectives, positions, and standpoints” (2007, p. 113).

A pragmatic approach was considered the most appropriate strategy for this thesis by providing an epistemological justification based on John Dewey’s theory of inquiry. Dewey believed “actions as outcomes of inquiry serve as the basis for beliefs” (Morgan, 2014, p1048). Instead of applying a philosophy of knowledge, Dewey (ibid, p1047) alternatively relied on a systematic approach to knowledge, outlined in his five-step process:

1. Recognising a situation as problematic.
2. Considering the difference it makes to define the problem one way rather than another.

3. Developing a possible line of action as a response to the problem.
4. Evaluating potential actions in terms of their likely consequences.
5. Taking actions that are felt to be likely to address the problematic situation.

By adopting this theory, metaphysical versions of knowledge and the nature of reality are replaced by inquiry experiences based on beliefs and actions.

The methodological approach follows Teddlie and Tashakkori's (2006) bottom-up approach, where the research aims and objectives are identified first, which drives the methodological choices selected to conduct the research. A convergent design (Creswell and Plano Clark, 2018) was chosen as it allowed for the collection of both quantitative (surveys and document analysis) and qualitative data (semi-structured interviews, document analysis) while examining the same phenomenon. Denzin contends, "the combination of multiple methodological practices, empirical materials, perspectives, and observers in a single study is best understood as a strategy that adds rigour, breadth complexity, richness, and depth to any inquiry" (2012, p82). Within a convergent design, datasets are commonly compared and combined to produce a rich body of new evidence or to back up or identify changes within the data. This study's research requirements inferred that qualitative and quantitative investigations would examine separate concepts. The collected data was then analysed, presented independently, and combined during the mixed-method synthesis stage, producing an overall narrative.

## Scottish Music Industries Model

In order to map the current music industries in Scotland, an initial investigation was undertaken, examining similar music-related maps of comparable size and scale within the literature review (Laing, 2000; Williamson et al., 2003; EKOS, 2013; Vasquez, 2017; UK Music, 2019). Although this task was beneficial in identifying key intermediaries and sectors that comprise numerous music sectors, none of the reports offered a model that could be utilised in the Scottish context. Each map had elements that could have been included in this project; however, some elements were irrelevant in the Scottish context. The core global music business revolves around three sectors: recorded music, music publishing, and live music; however, Scotland does not have any publishers of scale, and the

recording sector is comprised of micro and small enterprises. Additionally, Scotland lacks physical music distributors, whilst the production of physical music is only available on a small project basis.

The best option was to construct a new model based on the current structure and design of the Scottish music industries. Previous industry analysis (Williamson et al., 2003; Vasquez, 2017; UK Music, 2020) has often targeted economic gains, similar to the remit for this thesis; however, due to the pandemic impact, I felt that it was wrong to completely dismiss the social and cultural influence of music completely. Therefore, the social and cultural impact will be featured in Chapter Five, albeit to a lesser degree than the economic impact. Additionally, music education was featured previously in Scottish mapping reports as a stand-alone sector. However, in this thesis, it will feature in the funding and development section.

This mapping project aimed to better understand the industry as a cohesive network of intermediaries and track value between its members. To successfully map the music industries and investigate value creation, Allee's Value Network Analysis (2008) was utilised to comprehend where value was lost within the Scottish music sector. The decision to include VNA within this project came from previous research conducted in Scandinavia. A report by Vasquez (2017) mapped the Norwegian music industries to track value between its core intermediaries and identify the importance of relationships between sectors.

An initial analysis of intermediaries between the researcher and the SMIA concluded with a list of the key participants active in the Scottish music industries. These were grouped into thematic sectors after researching previous mapping reports. 'Music by Numbers' (2019), a report by UK Music, produced an economic map of the UK music industry identifying six key themes. Five of the six topics presented applied to this thesis: Music Creators, Live Music, Recorded Music, Retail, and Music Representatives. The 2003 Scottish mapping report from Williamson et al. (2003) provided a chapter on The Media, which was adapted and added to the other five themes recognised by UK Music. While there was debate regarding the media and its inclusion for a considerable period, the survey results solidified its position as a critical sector due to feedback from music creators and their connection to media agencies. The final theme added was Funding and

Development. Although missing from all previous reports, the researcher and the SMIA believed funding and development were essential. It remains an under-discussed element of the Scottish music industries, which is intriguing due to its ability to financially support sectors.

The final thematic list of sectors mapped is as follows:

1. Music Creators (Composers, Songwriters, Musicians and Artists)
2. Live Music (Promoters, Music Venues, Music Festivals, Auxiliary Services, Touring Crew, and Ticketing)
3. Recorded Music (Record Labels, Recording Studios, Distribution, Producers)
4. Music Representatives (Music Managers, Collection Management Agencies, Live Agents, Publishers)
5. Retail (Musical Instruments, Record Shops, Instrument Makers)
6. Funding and Development (Scottish Government, Creative Scotland, Development Agencies, Education)
7. Media (Radio, TV, Press)

The placement of publishers within music representatives undoubtedly requires explanation. The scarcity of dedicated music publishers in Scotland (eight identified from desk-based research) indicated that it did not require a dedicated section. However, publishing could have been positioned within the recorded music sector. Whilst it would not have been out of place, it is evident that publishers represent the interests of music creators, which fits far more within the music representative's section.

## Scope and Definition

To answer the research questions, it was first necessary to explain the scope of the research and provide definitions where appropriate. When I joined the project, the idea of mapping the industries from an artist-centric position was a clear objective specified by the SMIA. Becker believes that "all artistic work, like all human activity, involves the joint activity of a number, often a large number, of

people” (1982, p1). His opinion mirrors my personal experiences of making music, making his theory relevant to this study.

The majority of the research was conducted in Glasgow. Although lockdown restrictions made travel challenging, every attempt was made to involve participants from across Scotland to encompass a broad range of music-making activities and different levels of expertise. As the purpose of the study was to provide a comprehensive economic valuation of the music industries in Scotland, the thematic areas chosen intended to measure the economic value generated and utilised by both music creators and intermediaries.

A critical aspect of this report has been defining the music industries. In cooperation with the SMIA, a definition was agreed upon incorporating all identifiable sectors and intermediaries. Therefore, the music industries can be defined as an economic system that exists to create and exploit musical assets, compositions, recordings of compositions, live performances, and artist brands. As a complicated ecosystem (arguably more so than other art forms such as literature, theatre and visual art), the music industries overlap with other creative industries. Instrument manufacture and merchandise with both craft and design and festivals with events. (Pearlman, 2019).

Data collection occurred across two groups: music creators and cultural intermediaries working within Scotland’s broader music industries. Music creators are individuals who create, record or perform music. Intermediaries are workers operating across all sectors of music activity who help generate value for music creators and their products while sustaining the music industries in Scotland.

## Data Collection Methods

The initial plan for data collection was to conduct semi-structured interviews with intermediaries and identify critical themes that could be integrated into an online survey. However, lockdown restrictions and the closure of many music businesses made it challenging to arrange interviews when many intermediaries had more immediate concerns. Therefore, I switched positions, designing the survey first and conducting the interviews afterwards.

## *Surveys*

This thesis's most extensive data collection comes from an online survey designed to collect industry information from music creators and intermediaries. The rationale for choosing this method was primarily rooted in the scope of the study, as it encompassed a large geographical area. By conducting an online survey, which can be shared online and amongst colleagues, the reach is far superior to postal surveys, which are likely to be ignored or potentially lost in the post. Additionally, online data capture's low-cost nature and effectiveness provided more time for data analysis. The survey was designed so that those completing it could only answer questions about their specific area of work.

The survey objectives were agreed upon in collaboration with the partner organisation after carefully planning a set of closed and open-ended questions, allowing the participant to give further depth to an answer in specific cases. The closed inquiries were limited to dichotomous responses such as yes or no, while the multiple-choice questions included topics such as ethnicity and personal income.

The population for the study was individuals working within the music industries who reside in Scotland. For sampling purposes, multiple surveys were designed based on thematic sectors identified by the stakeholder analysis, which led to different samples for each investigation. All participants were 18 to 65 years old and comprised both males and females. Purposive sampling was chosen as the most effective method to collect data (Creswell, 2014). The University of Glasgow, The Musicians Union, The Scottish Music Centre, and the SMIA all promoted the survey using their social media accounts targeting music professionals in Scotland. I hoped that by intentionally promoting the survey to music professionals, the responses would be "good sources of information" (Patten and Newhart, 2018, p115). Additionally, my connections within the Scottish music industries permitted direct contact with many vital intermediaries requesting participation, which I hoped would conclude with a "snowball effect" (Sue and Ritter, 2012, p45) as word of mouth began to spread within music circles. As the data requested was sensitive regarding financial income and personal opinions, it

was agreed to anonymise all participants, providing them free will and the opportunity to air views without any negativity.

The tool chosen to host the survey was Jisc Online Surveys, a custom-designed software tool tasked with collecting and organising data from participants from the University of Glasgow. An explanation was offered at this point to inform participants of the research project's aims and objectives, allowing them to make an informed choice as to whether they wanted to proceed. Merriam et al. contend that researchers should position themselves within the study if they are what is known as "insiders" (2001, p411). Therefore, I elected to disclose my position within the music sector to reduce the possibility of "knowledge resistance" (Williamson et al., 2011, p464). Based on previous research (Williamson et al., 2003), knowledge resistance occurred in a comparable study when academics published their findings but were met with opposition from professionals within the industry. By disclosing my position as both an academic and a music professional, I hoped the study would be given credibility and accepted without opposition. By opting to disclose personal details, the survey was then open to response bias from participants, known as the "social desirability paradigm" (Stockemer, 2019, p41), which tends to result in two outcomes. First, participants choose answers based on what they believe are culturally desirable responses. Second, they give responses to paint themselves in a positive light. For example, if participants stated that their yearly income was higher than what it was. For this reason, everyone was given anonymity.

The survey received 109 responses, with 65 of those coming from music creators, 16 from live music, ten from recorded music, 15 from music representatives, and two from music retail. Although the response rate was disappointing, it was expected. Once lockdown restrictions were imposed, art agencies began surveying members to collect data on their personal circumstances. I feel that there was somewhat of an adverse reaction to so many online questionnaires, which could be a possible reason for the low response rate. However, a good data set was extracted from music creators and was presented throughout the thesis. It was most prominently featured in the findings section of Chapter Eight and discussed there, too.

### *Semi-Structured Interviews*

Semi-structured interviews were chosen to better understand cultural workers and their parallel relationships with additional music sectors. Early in the research process, I began considering potential interview candidates and held several conversations with the SMIA regarding whom they would like from each sector.

Between 2021 and 2023, fifteen in-depth interviews were conducted. The questions were grouped around specific themes, such as entryways to jobs, the impact of Covid-19, and how they viewed the music industries in Scotland. However, as each sector varies, the questions were often a starting block to a much broader discussion. Participants were offered anonymity, although only one wanted to remain unknown. I requested more interviews than the amount conducted; however, there were a lot of ignored emails. Most surprising was the lack of uptake from music professionals I know personally from within the sector. Many did not reply to my requests and then did not mention it when I saw them in person. My intention was to lower the risk of individuals claiming their business interests were not represented within the study. Although that was not executed, I am confident it was attempted. Alongside the long-form interviews, I contacted three sector-specific colleagues to collect data not offered in the survey. The information was linked to the economic estimations calculated in chapter five.

Interviews were arranged by email and conducted face-to-face unless this was impractical due to geographical issues or lockdown restrictions. In those instances, the online video calling platform Zoom was utilised. All meetings were recorded and transcribed later, with notes taken to highlight and accentuate specific points of significance. Although interviews followed a pre-arranged schedule to collect specific data, the researcher allowed the participants to lead the conversation, often directing to facts and information new to the study. The data analysis took an inductive approach, which Patten and Newhart contend takes a “ground-up approach, using observations and conclusions to formulate a theory” (2018, p10). The final step was to code the data into thematic groupings, which would be easily identifiable when writing up the findings.



### *Desk-based Data Collection*

Secondary data collection was connected to the economic estimations for the measuring component in chapter five. To capture economic data, an extensive online web search of government statistics, Companies House, and previous music reports occurred. Once a database of individuals and businesses trading in Scotland was collated, it was time to collect their annual revenues. Companies House was useful for investigating large businesses; however, in most cases, the yearly revenue was conflated with previous earnings and additional assets.

The most time-consuming element of data collection was estimating the projected number of live shows each music creator performed and the number of shows which took place in each venue. For this, three separate sources were utilised for cross-referencing: Facebook events, Setlist FM and Songkick. In some instances, music venue listings and band tour posters were analysed for additional data.

Economic estimations of music festivals were based on ticket prices and the volume of tickets sold, which can be found on Efestivals or the event's website. For additional data, such as whether the event sold out, a basic internet search often returned news articles with reliable data. In some cases, no reliable data was sourced for businesses. In those instances, a comparative analysis with businesses of a similar size within the same business sector was conducted.

### Limitations due to Covid-19

The thesis has undoubtedly faced disruption due to the lockdown measures and closure of music businesses. The response rate to the survey was lower than hoped, possibly due to the high number of impact reports deployed across the creative industries in the first few months of the pandemic.

Several key interviews were also requested; however, the individuals did not respond. In some instances, interviews were arranged but then cancelled at the last minute without being rearranged. This was not due to a lack of trying, but I moved on once the respondent did not reply. An additional and unexpected

problem was requesting interviews with individuals I know in a professional capacity who did not respond even though they knew about the research.

## Ethics

The following section will display the actions taken to ensure the study was conducted with ethical rigour and to the exemplar standards set by the University of Glasgow's code of ethics. The moral areas most pertinent to this research project were informed consent and participant anonymity.

Informed consent was provided at each step of the data collection process. Before beginning the survey, participants read a plain language statement outlining the research aims and briefly describing the researcher's background. At this stage, participants could either take part or decide not to. Once interviews were complete, a consent form was collected to gain consent from individuals to use their data where applicable. Some of the data provided was personal; therefore, a number of participants were invited to verify details with the researcher post-process should they have any inquiries or concerns regarding the study. Confidentiality was guaranteed within the survey process as the researcher used a host site where users logged on without disclosing their names. Semi-structured interviews were conducted with individuals from organisations where the company name was disclosed but not the participant's identity.

## Conclusion

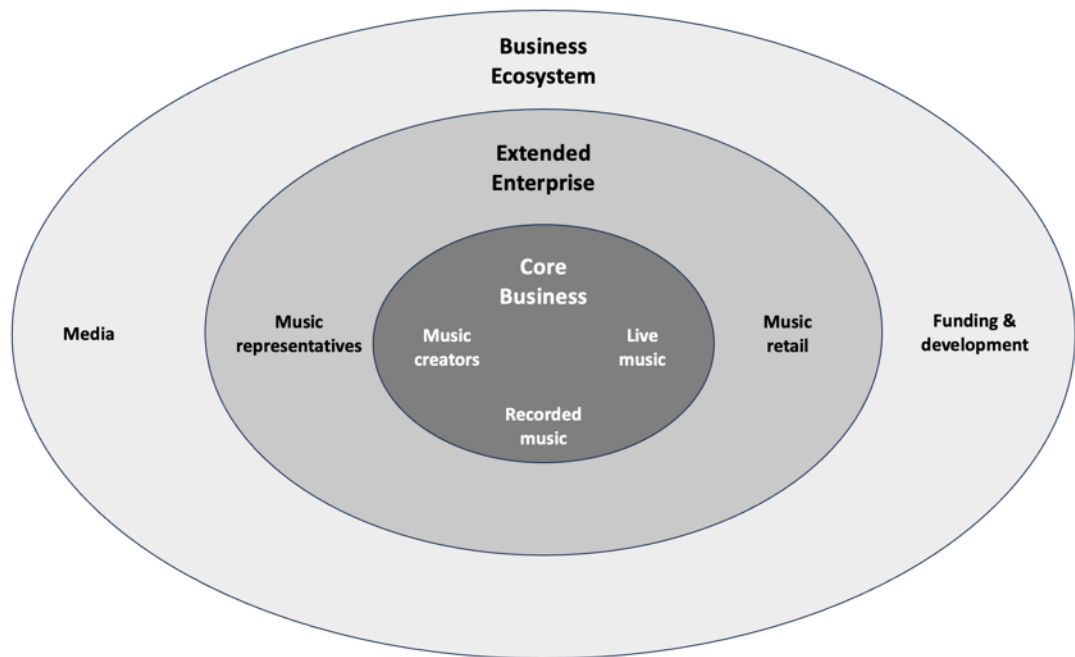
This chapter has provided details on the methods used to underpin the study's research design. By constructing a narrative of the music industries, the researcher aimed to portray a more accurate representation by mapping its activities and measuring the income from these actions. Additionally, as the COVID-19 pandemic was transpiring in real-time, the ability to deliver data as both an insider (backyard research) and from an academic perspective has been invaluable

## Chapter Four: Mapping the Scottish Music Industries

Current popular music research from Scotland is scarce and, in many cases, combined with additional nations within the UK and presented as a whole (Edwards, 2021); however, independent research is available, albeit slightly dated (Williamson et al., 2003; Ekos, 2013). Therefore, the first task of this chapter is to define what constitutes the Scottish music industries, followed by an examination of each sector. The main argument in this chapter posits that Scotland's music sector is a complex web of activity consisting of seven overlapping networks.

The chapter will employ a theoretical music industry framework, which will act as the foundation for the remainder of this thesis by building on previous music sector reviews and reports. The literature review identified Moore's Business Ecosystem model (1993) as a suitable approach to mapping business activities in Scotland based on his three overarching areas of work: Core business, extended enterprise, and business ecosystem. The seven music sectors were chosen for investigation after a textual analysis of similar music sectors (Williamson et al., 2003; EKOS, 2013; Vazquez, 2017; Edwards, 2021). Although this chapter is mapping the commercial market, elements of public culture will also be explored as the two spheres of activity often overlap.

- Core Business - Music Creators, Live Music, Recorded Music
- Extended Enterprise - Music Representatives, Music Retail
- Business Ecosystem - Funding and Development, The Media



## Scottish Music Industries Model

The first section will argue that music creators are the essential elements of the music industries in Scotland. The second will demonstrate the significance of the live sector, highlighting the significance of music tourism to the broader economy. The third section will analyse recorded music and posit that, whilst less economically significant than live music, it delivers high levels of cultural value. Section four will examine the role of music representatives within the music sector, illustrating their importance in creating economic value for music creators. Section five will investigate the role of music retail within Scotland and demonstrate how technology has impacted the sector. Part six will argue that although funding and development are rarely included within music mapping reports, Scotland's music sector remains highly subsidised and reliant on fiscal support. The final section will demonstrate that media services are less vital to the music sector than they once were.

## Core Business

### Music Creators

Music creators are at the heart of the Scottish music industries. Without them, there would be no commercial industry. Although this should be an obvious claim, the music sector is often characterised by revenue-generating activities (Edwards, 2021) rather than creative activities. Music economies are driven by four commercial assets (UK Music, 2020):

- a composition or song
- a master recording of that composition or song
- a live musical performance
- an artist as a brand

Cultural intermediaries in the music industries utilise these four assets to generate revenue in their respective professional areas while adding value to the artist or product. Additional revenue streams will be discussed in more detail later in the thesis; however, these four remain at the core of the global music industries. Music creators are responsible for almost half of the music industry's contribution to the UK economy, demonstrating their economic significance to the overall function of the sector (ibid). The vital aspect to recognise is that "it all begins with the songwriters/composers who write the music" (Vazquez, 2017, p10-11). The live music sector serves a mix of national and international artists and could function with the revenues of international acts alone. However, the recording sector works exclusively with Scottish artists, as do managers (Appendix Eight; Appendix Eighteen).

John Holden's Ecology of Culture model (2015) will assist in illustrating the three types of music-making activities occurring across the music industries in Scotland.

Although this thesis primarily examines the commercial sector, it is crucial to identify the non-commercial activities. Therefore, this chapter will also examine publicly funded and homemade (amateur) music-making activities. Music creators is an umbrella term incorporating composers, songwriters, producers, artists, and musicians.

### *Composers*

Composing is a Western musical tradition commonly associated with classical music, although it is synonymous with jazz and chamber music. It is commonly assumed that composers are the "creators of art or serious music" (Nash, 1961, p81), with the profession often portrayed as a role for the higher creative class who wish to innovate and push musical boundaries. There remains a perception that composers originate from middle-class families with access to economic resources, providing them with the means to pursue such a career (Taylor, 2016). Although true across much of the field, the ideology may be a broad generalisation when analysing composers across genres, particularly with the introduction of digital recording technologies.

Historically, income for composers has come from commissions, the performance of a written score or the sale of sheet music. Although the national touring companies receive funding directly from the Scottish government, this does not go to composers. Rather, arts organisations such as Red Note Ensemble and Chamber Music Scotland, funded by Creative Scotland, lead in commissioning new works. Additionally, a number of music festivals often commission new classical and jazz music, too (Buckley, 2015). Although commissions are an essential income element for composers, composing alone is not enough to sustain their careers, which explains why many perform live and seek teaching roles (Smith and Thwaites, 2019). Primary research confirms that composers are highly involved with music venues and festivals, further signifying that performing live is a key economic activity. Therefore, Scottish venues and festivals must continue programming new works to promote fresh and exciting talent and keep fans engaged whilst supplying a source of economic security. Composers have had to diversify their revenue streams as there has been a proliferation of new composers in recent years, suggesting the number of commissions available is insufficient to match the number of composers.

Two types of composers operate within Scotland: traditional music composers (classical, chamber) and modern digital composers (computer games, electronic music, movie soundtracks). However, it has been argued elsewhere that new technologies have "opened up ever-widening opportunities for popular composers to pursue such a composition/performance/promotion strategy, in contrast to the options available to classical composers" (Throsby, 2016, p159). In this sense, technology has affected composers differently depending on their genre.

Composing remains essential to Scotland's creative industries across various sectors, such as television, film, and computer games, with many of those in the sector receiving recognition. Ross Campbell won a Bafta award for his film scores, Anna Meredith won the SAY award in 2016, and Oliver Searle received the Young Performers Award from the British Composers Awards in 2018.

### *Songwriters and Producers*

A songwriter is an individual who writes a composition with lyrics. Although songwriters are often illustrated with romantic views of creativity, Shuker believes this ideology "must be tempered with an appreciation of the social conditions under which it takes place and the sheer graft involved" (2016, p43). Songwriters only have one revenue stream available: the exploitation of their songs through a publisher or independently (Anderton et al., 2013, p45). Almost all songwriters identified for this study perform their material. However, some notable exceptions include David Sneddon, one half of the songwriting duo Nexus, who has written with Lana Del Rey and Lewis Capaldi, whilst Jim Duguid has written with Paolo Nutini and Scottish newcomer Callum Beattie. It is evident that unless writing for established acts, forging a career solely as a songwriter does not always provide sufficient revenue, indicating why so many also perform live.

There appears to be minimal support for songwriters in Scotland from within the industry. As a result, the community often offers advice and training to up-and-coming songwriters in what appears to be a supportive network of creatives. Findlay Napier hosts the annual Glasgow Songwriting Festival and one-off events nationwide. A new, all-female collective from Tamara Schlesinger (Hen Hoose) has recruited some of the best Scottish songwriters to tackle inequalities in

the sector. With opportunities limited, it is alarming that specific institutions limit their development opportunities based on age. For example, the Ivor's Academy limits its rising songwriter award to those under twenty-five. Although not explicitly stated, PRS funding favours younger music creators too. One possible reason for this could be the apparent bias from major record labels towards signing predominantly younger acts to their roster.

The decline in revenue from record sales has impacted songwriters more than most other music creators, as others have diversified their revenue streams. Composers, artists and musicians all have a stake in live revenue, including the lucrative element of merchandise for some. The Covid-19 pandemic correctly illustrated the discrepancy, with Mulligan arguing that "artists are learning how it feels to be a songwriter" (Mulligan, 2020).

New recording technologies have introduced the producer to song composition. Producers will often use digital recording tools to build a track. They will then employ a songwriter to develop a melody and write lyrics or have a singer record a vocal track they have written themselves, resulting in fewer opportunities for composers and songwriters (de Laat, 2015). Calvin Harris is one of the most well-known producers globally; however, he does not reside in Scotland.

### *Musicians (Performers)*

Musicians are at the heart of the Scottish music industries. In many cases, a musician can also be a songwriter, composer, or artist; however, this section will primarily discuss musicians as individuals who play an instrument, either for a live performance or for recording purposes, to make a living from their activities.

The majority of musicians in Scotland are independent; however, a small percentage are employed via the NTCs, which are funded directly by the Scottish Government (Scottish Government, 2018a). Furthermore, the BBC supports the Scottish Symphony Orchestra (SSO), although wages are collected directly from television licence fees. The explicit funding provides guaranteed employment across the genre for musicians within Scotland and visiting musicians. The ringfenced funds are largely in place to ensure the genre's continued survival due to classical music's cultural significance and recent diminishing performance at the



box office. Haynes and Marshall note that "there exists in the classical sector (and jazz to a lesser extent) a pool of potential employers (e.g. orchestras, theatres) with whom individual musicians can seek work whereas, in popular music, musicians have tended to be seen as free contractors rather than (potential) employees" (2017, p461). In this sense, classically trained musicians are granted a higher social standing. However, it is unfair to compare both sets of musicians as the career trajectories and levels of training can vary significantly, with the economic resources required to train classical musicians from an early age different from those of most popular musicians.

Traditional and folk music has grown in popularity due to national promotion from agencies such as Hands Up for Trad (HUFT) and The Traditional Music Forum (TMF). The last fifty years have seen a growth in the commodification of these genres, with shows growing in size and musicians generating higher revenues than was previously possible (McKerrell, 2014). Data from the TMF indicates that most musicians in the genre are not performing to receive significant financial returns but instead trying to "commoditise their skills to the extent that they can make a comfortable living" (Blanche, 2019, p90). Of the 114 musicians surveyed by the TMF, 88% revealed that performance fees were their primary income source, followed by teaching, which was 65% (ibid, p28). That is not to say that musicians are not attempting to achieve commercial success; many are happy to be involved in a job they value. The export opportunities available for traditional and folk music suggest that it is also popular overseas, with Showcase Scotland Expo (SSE) successfully helping Scottish musicians earn revenue overseas via touring opportunities.

Although less economically lucrative than other genres, jazz music is grounded in live performance. There is no shortage of talented musicians; however, a lack of touring infrastructure has impeded the genre's progression in recent years. Despite Jazz Scotland's presence, New Music Scotland reported minimal programming for Jazz music in venues nationwide. Instead, the genre appears more prominent with festivals (Webster and McKay, 2016). There is only one dedicated jazz venue in Scotland, The Jazz Bar in Edinburgh. Additionally, musicians have begun promoting their live shows in venues around Glasgow and Edinburgh as vehicles to drive the genre forward and garner interest from new audiences (Rodgers, 2022).

Although live music has become a lucrative sector for some, there are still instances when performers are requested to work for free. The MU (2012) surveyed or interviewed almost 2000 musicians, with 60% revealing they had received a request to work for free in the previous year. The TMF (2019) conducted similar research, which surveyed 114 musicians and revealed that 63% of respondents had received a request to work for free the previous year, indicating that the practice was still an issue.

Aside from live performances, musicians have a stake in copyright should they perform on studio recordings. Wikstrom (2009) argued that music has become a copyright industry. However, research from Phillips and Street reveals that classical musicians were less interested in copyright. In contrast, rock and pop musicians had a vested interest, which suggests that attitudes vary depending on revenue opportunities and genre (2015, p350).

Although the work of amateur musicians is too broad a topic for this thesis, they are still noteworthy because they play an integral role in Scotland's music industries. Finnegan refers to these individuals as hidden musicians (2007) who often participate in local music-making activities. Many successful musicians within Scotland do not earn their total income from music activities alone, suggesting they are not professionals. Finnegan admits that delineating between amateur and professional is challenging as they operate on "a complex continuum with many different possible variations" (2007, p34). It is also possible that amateur can refer to the level of skill a musician has on their instrument.

Although most revenue generated from promoters originates from high-profile acts, amateur musicians remain noteworthy as they promote music at a grassroots level within the Scottish music industries. The Traditional Arts Working Group identified the importance of music-making across all competencies, explaining that "there is a continuum between voluntary and amateur activity, through to professional, commercial activity, and people will find themselves at several points on the continuum (sometimes simultaneously) at different times in their musical life" (Francis et al., 2010, p33).

## *Artists*

An artist is a musician who records music written by themselves or by another songwriter or composer (Strasser, 2010). Usually, the artist will embark on a tour to promote and perform the music they have recorded. In this sense, an artist is both a creator and a performer. In the pre-digital music sector, artists were often signed to major labels as they had the funds to invest in marketing, promotion and distribution (Negus, 1992, p55). However, the number of additional roles artists undertake has grown because of the opportunities presented by new digital technologies. Although the do-it-yourself concept is not new (punk music, e.g.), the internet has provided the means to perform tasks often outsourced to intermediaries.

Research investigating the strategies of independent artists noted that "becoming a self-sufficient business entity requires mastering advanced functions such as financing, distribution, merchandising, public relations, marketing, and branding" (Hracs, 2015, p47). A number of interviews for this thesis supported the argument proposed by Hracs, although there are several reasons why that may be the case. C Duncan (2022) noted that recording all his music allowed him to work when and wherever he wanted; however, it could also be suggested that this was a financial decision to save revenue. Everts et al. note that while some musicians can utilise new technologies because they choose to, the other side of the discussion asserts that early-career musicians "have to take responsibility for more work activities to build a career" (2021, p97). Independent artist Malka (Schlesinger, 2022) discussed her DIY aesthetic, explaining that she has a limited budget and, therefore, has to take on multiple roles which she can not get anyone else to perform for free. In this sense, performing these tasks is viewed as a short-term solution until more financial backing is sourced.

Over the years, Scotland has produced popular acts that are economically successful nationally and internationally. A mix of heritage acts such as Texas, The Proclaimers and Simple Minds sit alongside newer artists such as Chvrches, Young Fathers, and Biffy Clyro, operating actively in the recording and live sectors. Even jazz has produced a popular artist with Fergus McCreadie, who won

the SAY Award in 2022. The Scottish economy profits from the income generated by these artists, although a growing number choose to leave Scotland and relocate. For instance, Lauren Mayberry of Chvrches lives in Los Angeles, while the rock band Travis can be located between the UK and Los Angeles.

Plenty of artists choose to remain in Scotland, with the most economically significant genres remaining pop and rock. The recent success stories are Lewis Capaldi and Gerry Cinnamon. Capaldi, hailing from West Lothian, has achieved global stardom since he broke onto the scene in 2017, becoming the most significant music export the country has produced in a long time. By the end of 2019, Capaldi had become the first Scottish solo artist to top the Billboard Hot 100 in America since 1981 (Savage, 2019). Another star, Gerry Cinnamon, had been on the industry's periphery for some time before selling out arenas across the UK. Cinnamon's rise to fame came with no record label or team, culminating in two sold-out shows at Hampden Park. Cinnamon currently has over 250 million streams on Spotify alone. The rise of both artists has been unique as they are both working-class, self-taught musicians. In recent years, there has been a shift in popularity regarding artists from the folk and traditional genres. Many of these homegrown artists, such as Elephant Sessions, Skippinish, and Peat and Diezel, are selling out commercial venues the Barrowlands and the Glasgow Academy. The success is identifiable both at home and internationally.

Although some artists pursue the independent route, many are still eager to go down the traditional path and sign with a record label. However, investing in musicians has changed as album sales have declined. Few record labels are willing to risk signing an artist until they have a proven fanbase for live shows with high streaming figures and high social media traffic, suggesting that major labels do not want to develop artists anymore. Instead, they want to generate as much revenue as possible as quickly as possible.

Nine Scottish acts remain signed to the three major labels in the UK, although there are no folk, traditional or jazz acts.

Artist	Label
Biffy Clyro	Warner Music Group
The Snuts	Warner Music (Parlophone)
Amy MacDonald	Universal
KT Tunstall	Universal
Chvrches	Universal
Emeli Sandé	Universal
Lewis Capaldi	Universal
The Eurythmics	Sony Music
Primal Scream	Sony Music
Calvin Harris	Sony Music

## Summary

The section has revealed the expansive activities of music creators across the sector whilst defining their activities. It has been argued elsewhere that Scotland's problem has long been the lack of music creators achieving and maintaining commercial success (List, 1990; MIST, 1994; Williamson et al., 2003); however, the global interest in Lewis Capaldi has shown that it is possible to produce a world-class artist, albeit with business links outside of Scotland. By analysing the number of Scottish artists signed to major labels in comparison to the remainder of the UK, the numbers are extremely low. Additionally, The Mercury Music Prize only had one Scottish act nominated for both 2021 and 2022; however, this is not fully representative of the quality of music produced nationally. The overarching issue remains fair remuneration for music creators; however, as this section has shown, this has become increasingly difficult for songwriters and composers who do not have live performance revenues.

## Live Music

"The conventional argument in rock analysis has been that live concerts exist courtesy of the record industry: their function is to promote records, to which they

are subordinate (and for which purpose they are subsidised). But this argument no longer seems valid" (Frith, 2007, p5)

Sara Cohen defines live music as "events that bring musicians and audiences together in one place at one time and involve performance on vocals or other music instruments and technologies, or with music recordings" (2012, p587). The live sector in Scotland has consistently performed above the UK average (EKOS, 2013) and remains a constant strength for the sector. However, as with other music industries, the live sector relies on a mixture of national and international acts. Primary research for this thesis has illustrated how vital live music remains as a means of revenue for music creators. UK Music revealed that live music contributed £1.3 billion to the UK economy in 2019, a 17% increase compared to 2017, whereas recorded music generated less than half of the live sector GVA for the same period (Edwards, 2020)

Frith argued that the "value of music (the reasons why people are prepared to pay money for it) remains centred in its live experience" (2007, p4), with Forbes describing this phenomenon as "thereness" (2011, p114). The sector has identified and exploited this through the growth of live shows and festivals. This section will illustrate the importance of the live sector to the overall functioning of the music sector in Scotland, as well as the possibilities of music tourism to the broader economy.

### *Live Music Promoters*

The role of a promoter is to book artists and musicians to perform music in pre-determined music venues or festival spaces. Once a financial fee and terms have been agreed upon, the promoter is responsible for booking the venue, selling tickets, and remaining in contact with the act or their representatives. If the show does not perform well, the artist still receives their guaranteed fee; therefore, the financial burden lies with the promoter with Harrison acknowledging they are "the risk takers" (Harrison, 2021, p563). Cloonan argues that three types of promoter are identifiable across Scotland: professional, state and enthusiast (Cloonan, 2012); however, it could also be asserted that several semi-professional (part-time) promoters operate in the main cities promoting small, local, up-and-coming bands and artists. Regardless of the model, all types work on the

conventional basis of selling tickets to generate revenue, with the exception of clubs and societies (enthusiasts), which sometimes function as charities or not-for-profit organisations.

Scotland has three prominent commercial promoters operating predominantly across the central belt. Dance Factory Concerts (DF Concerts), the largest of the three, was bought over in 2008 by Live Nation, whilst Regular Music was acquired by Deutsche Entertainment AG in 2022. Paul Cardow Limited (PCL) remains independent. All three promoters work with the rock and pop genres; however, the popularity of hip-hop and dance music has seen them branch out in recent years. Around Scotland, several smaller, independent companies such as 432 Presents, Synergy Concerts, Jazz Scotland, Triple G Music, PM Music, Active Events, CPL, and Beyond Presents, book rock and pop; however, these promoters are much more diverse in their programming across genres such as metal, traditional music, folk music and jazz. There does not appear to be much competition between promoters, with Brennan and Webster noting that many "co-exist symbiotically" (2011, p11) within the sector.

Classical music has no specific promoter in Scotland, instead following the state model with the five performing companies personally overseeing their touring schedules. Each of the five companies has headquarters in various venues in Scotland. These are all situated within the central belt.

- Scottish Opera - Glasgow
- Royal Scottish National Orchestra - Glasgow
- Scottish Chamber Orchestra - Edinburgh
- Scottish Ballet - Glasgow
- National Theatre of Scotland - Glasgow

Scottish Ballet and The National Theatre of Scotland have musical components in their performances, hence their inclusion in this study.

Due to their national, international and cultural significance, the Scottish Government funds these groups to tour. From 2016 to 2018, over 7000 performances involving the five NTCs took place worldwide and closer to home in each local authority within Scotland. 2017/18 saw £350,000 invested in touring for

all five national companies, leading to worldwide touring and substantial investment in Scotland's image on a global platform (Scotgov, 2018). Music promoters are an essential component of the Scottish music industries. With low economic returns for recorded music, promoters have become key intermediaries for music creators in Scotland as gatekeepers and critical revenue sources for acts of all sizes.

### *Ticketing Agents*

Promoters outsource their ticketing arrangements to venue box offices or primary ticketing agents who sell and distribute tickets on their behalf, as it is a specialised profession that most promoters cannot do themselves. Behr and Cloonan explain that they are "the primary point of contact for customers" (2020, p97), which indicates that they are a buffer if anything were to go wrong with the show.

Scotland has three ticket agencies targeting the domestic market. Gigs in Scotland is an agency DF Concerts operates to promote their shows, whilst Glasgow Life is a charity working on behalf of Glasgow City Council. The company look after five independent venues: The Tramway Theatre, The Royal Concert Hall, The Old Fruitmarket, The City Halls and The Bandstand in Kelvingrove Park. Ticket Scotland is the only independent agency operating within Scotland. With offices in Glasgow and Edinburgh, they cover the length and breadth of the country, covering all levels of gigs, ranging from small local promoters to Regular Music and DF Concerts.

### *Live Music Venues*

Scotland has diverse music venues, ranging from bars and pubs to large arenas operating across private, commercial and council-owned sites. Specific trust venues such as the Perth Concert Hall and The Royal Concert Hall in Glasgow receive funding from Creative Scotland, supporting their programmed event list whilst supporting local promoters. Multiple arts centres are at the core of local programming. Glasgow's Centre for Contemporary Arts, An Lanntair in Lewis and Comar in Mull all receive funding from Creative Scotland's regular funding scheme. These institutions enjoy a wide variety of genres by embracing a mixture of local and international acts. Music venues can also act as spaces for additional



activities, such as restaurants or bars, rehearsal and recording spaces that are essential lifelines for new musicians as they develop, and hubs for education and community work that act as spaces for social interaction.

Although Scotland has sixty-three dedicated ticketed music venues, almost half of these are located in Glasgow, which indicates that Glasgow is a hub of music activity for music creators and intermediaries. Edinburgh accounted for just under a quarter, with 15 venues. A negative aspect identified in several cities is the lack of mid-sized venues. Dundee has several small club-size venues at around 300 capacity and Fat Sam's at 1000 capacity; however, the next step up is Caird Hall, which is 2300. The shortage of venues for artists to scale up organically is identifiable across most Scottish cities, with the exception of Glasgow. As a result, growth and development opportunities for music creators are potentially being lost.

The Hydro in Glasgow has been a major economic booster to the local economy in Glasgow due to both the sale of tickets and the music tourism opportunities it provides. Pollstar (2018) revealed that the venue sold 1,040,956 tickets and was the fourth most active arena in the world in 2018. Based on these ticket sales, this thesis estimates that the revenue from ticket sales was around £52,047,800. Current research from UK Music (Edwards, 2023) demonstrated that music tourism spending in Scotland brought in £581 million to the Scottish economy in 2022. Although the Hydro is not the only venue visited by music fans, it emphasises the economic possibilities of large-scale shows for both the music industries and the Scottish Government.

Outside of the major cities, a notable lack of touring infrastructure is identifiable in smaller towns, as artists have limited options to perform live. Although Glasgow and Edinburgh have venues of size and scale, more connection is required between urban and rural touring across the country, with minimal opportunities available for any tours of scale. However, Mumford and Sons demonstrated in 2011 that it is possible after embarking on an eight-date tour of the highlands and islands (Goodwyn, 2011). Colin Keenan from ATC Live explained this point by highlighting that "Dundee and Stirling and Falkirk, I feel like it used to be easier to go in and play. We've lost some great venues in those markets" (Keenan, 2022). The fact that these locations at one time did have

venues that closed suggests that there is no immediate demand for live music; however, the increased revenues linked to live music point to increased demand.

### *Grassroots Music Venues*

Grassroots music venues are epicentres for the creativity and growth of music creators, even though music creators (or owners) rarely profit at this activity level. Although these venues are small, often in disrepute and lacking adequate sound equipment, they are integral to local music communities as hubs of activity and locations to connect musicians. Between 2008 and 2018, 35% of GMVs ceased trading in the UK (UK Music, 2018), resulting in a loss of economic, social and cultural value. However, GMVs are one area that is well represented within Scotland, with at least one in each major city (Appendix Four).

The Music Venue Trust identifies the programming of cultural activity as the critical focus of all GMVs and as risk-takers in booking new or unknown talent. These venues must book up-and-coming bands so that the music industries in Scotland and the wider UK can reap the economic rewards from any such investment further down the line (Behr et al., 2014). These venues are also the starting point for many musicians to begin their careers as amateurs before progressing to professionals.

After several GMV closures and the threat of countless more, the Scottish Government followed Westminster's lead in applying a protective policy due to live music's economic and cultural importance. The Agent of Change principle was written into Scottish law in 2019 to protect venues of all sizes, especially those operating independently. The primary directive of the initiative was to make developers responsible for recognising and addressing any issues that may arise from nearby music venues regarding noise (Street, 2022).

### *Music Festivals*

There are seventeen varieties of music festivals (Stone, 2009); however, these can be illustrated in three ways (Webster and McKay, 2016): rural events, which incorporate camping and amplified music; venue-based events linked by genre or

theme and urban carnivals which are often street-based. Elements of these can, in many cases, overlap. Rock and pop festivals remain the most economically viable events, often organised by established promoters such as DF Concerts and Regular Music. Reynolds acknowledges that the social significance and demand for music festivals "has created a separate business, within that of live music" (2016, p160). The term "festival season" (ibid, p51) has become synonymous with large outdoor festivals often occurring during the summer. Although Baumol and Bowen's theory of cost disease (Throsby, 1996) and economies of scale are still relevant to performances in music venues, festivals have adapted and grown due to sound technology, allowing more considerable numbers of people to attend.

Music festivals in Scotland can be significant drivers of local economic growth due to the considerable number of fans attending. TRNSMT festival in Glasgow attracts around 50,000 fans to the city centre event daily, with many travelling to attend. UK Music (Edwards, 2023) acknowledges the broader impact of employment and music tourism on festivals, revealing that in 2022, Scotland welcomed 1.5 million music tourists with 1.4 million domestic travellers, whilst 110,000 were foreign. Additionally, it is estimated that around 5340 individuals are employed due to music tourism. Whilst this is great for the economy, it should be noted that events of this nature can also be problematic due to the high volume of attendees passing through the city with disruption to local services, noise complaints, and drunken behaviour from attendees have all been noted as problematic (Jones, 2023; Tiwari, 2023).

Not all events are large-scale, with many festivals scaled back as boutique and family-friendly. Although smaller, these events are equally vital for the local economy by investing in rural areas that would otherwise only experience summertime tourism. Events such as Kelburn Garden Party and Eden Festival cater to a multicultural audience with music and art spanning various genres. Several specialist festivals operate each year to promote specific genres featuring domestic and international acts. The Glasgow Jazz Festival has drawn crowds since 1987, with top names coming worldwide to perform. The festival also allows delegates from Jazz communities worldwide to see local musicians perform at the Jazz Promotion Network Conference, with potential touring opportunities (Creative Scotland, 2019). Jazz Scotland also organises several smaller festivals in Aberdeen, Islay and Dundee.

Celtic Connections is an annual folk, roots and world music festival held across multiple venues in Glasgow. Since 1994, Glasgow Life has promoted the event with yearly growth. The first event, utilising only the Royal Concert Hall, had 27,000 attendees across 66 events. In contrast, the 2018 event occurred in 28 venues, with over 130,000 individuals attending 350 events (Folk Radio UK, 2018). Although operated for profit, the festival also promotes music education by providing access to free concerts, events and workshops for school children, partly due to the investment and support from Creative Scotland.

Not all festivals run for commercial gain, with some operating as non-profit charities and community projects. These events often incorporate live music with workshops and ceilidhs to boost local economies and promote a sense of community. Knockengoroch Festival in Dumfries and Galloway aims to keep the traditional Celtic culture alive while promoting multi-ethnicity and world music across traditional and contemporary platforms. As part of a community interest group, it maintains social and cultural value for the local community. Many traditional festivals operate in the same fashion as Knockengoroch, with the Montrose Music Festival promoting one mainstream act to support its programming of local musicians.

### *Auxiliary Live Services*

The production of a live show can be thought of as the "equipment, people, and processes" (Reynolds, 2016, 229) that come together for the show to occur. Live shows are the combined work of many stakeholders, including those who supply, construct, and operate live music events at a technical level. These intermediaries are crucial to the smooth running of events. Most companies offering these services are located in the central belt, although there are exceptions with Apex Acoustics in Dundee and Limelight event services in Inverness. Ad-Lib, one of the biggest suppliers in the UK, has an office/warehouse in Paisley, helping to support domestic and international acts. The remaining suppliers are all registered in Scotland.

## *Touring and Local Crew*

Attending a show is all about seeing the artist on stage. Little thought rarely goes into how the show came to be. Behind the scenes at every live event is a local and touring crew team who work to make the event run as smoothly as possible. These staff members have become known as "roadies" (Rutter, 2011, p61). A touring act will generally have a tour manager, two on-stage techs (guitars and drums), a sound engineer and a lighting engineer for a mid-size show (Forde, 2017). The promoter of these shows will provide the local crew to help solve any technical issues on the day. Local crew, referred to as In House, sometimes have a permanent position within a venue, although they are usually self-employed and move between venues. Touring crew, depending on experience, can command wages ranging from £150 to £450 a day (Interview 3, 2023). These wages are reflective of the extended hours that workers must adopt.

## Summary

This section has illustrated that live music is Scotland's most commercially driven sector, generating revenue for both those performing and those helping to stage events. However, there is a discernible distinction between those operating at the grassroots level and those involved in large-scale events. Additionally, tourism opportunities for stimulating local economies have also been demonstrated. These will be discussed in more detail in the following chapter.

## Recorded Music

The recorded music sector in Scotland can be characterised as a group of intermediaries who help to convert symbolic goods (songs) to commodities. Globally, the sector has encountered several disruptions over the years due to technological disruptions that have altered how music is stored and retrieved (Frith, 2001). The sector's most recent period of disruption resulted from digitalisation; however, the effects have since begun to settle, and the sector appears to be experiencing a spell of relative stability. Becker acknowledges these

changes, noting that "social systems which produce art survive in all sorts of ways, though never exactly as they have in the past" (2008, p6).

The following section will demonstrate that while recorded music is less consequential to the music sector in Scotland than live music, it retains a crucial role in delivering national cultural content.

### *Record Labels*

A record label is a business that aims to exploit music recordings to increase their economic returns. Arditi explains that "record labels provide the artists with the means to record, distribute, and market a recording in exchange for the rights to the recording through an advance (a prepayment of cash on potential royalties). This is possible because copyright is transferable" (2020, p11). It is the artist's role to create music, and it is the responsibility of the record company to manufacture, distribute and market the product so it reaches a broad spectrum of the public, often via TV, media outlets and radio (Rutter, 2011). The decision of whom to work with is often challenging and based on a "whole series of commercial judgements and cultural assumptions" (Negus, 1999, p32). The standard recording contract altered as the sale of physical music declined. As Marshall notes, major labels and several large independents adopted a "360 or 'multi-rights' deal, in which the record label participates in and receives income from a range of musical activities beyond the sales of recordings" (2012, p78). There is no data to suggest that this occurs within Scotland.

As mentioned previously, record companies are interested in intellectual property (IP), which comes from the work of songwriters and composers. A previous music sector review in Scotland correctly argued that "it is those that own and exploit that IP that typically command the greatest economic returns – the record labels and publishers" (Ekos, 2013, p47); however, retaining intellectual property in Scotland is a significant issue as the exploitation of artists' work is often maintained by large independents or major record labels in London. This is likely due to the inability to compete with prominent record labels with more finances to invest in artists and their campaigns.

The recent successful exporters of music, Lewis Capaldi, Paolo Nutini, Young Fathers and Chvrches, are all signed to London-based labels, which retain revenues until the artist makes a profit. In this sense, Scotland is losing economic value due to an underdeveloped infrastructure. However, this disregards the reality that Scotland has a relatively successful independent scene that pursues music of cultural significance. In this sense, Scottish record labels follow Negus's assumption that culture can produce an industry, albeit on a localised scale (2004, p14).

The most profitable labels in Scotland began as platforms to release music for their owners and other artists. Mogwai founded Rock Action Records, The Delgados launched Chemikal Underground, and Slam co-founded Soma Records. More recently, Skerryvore formed Tiree Records, whilst DJ Jackmaster co-founded Numbers. Although this could be defined as "an expression of symbolic resistance" (Drijver and Hitters, 2017, p20), it is more likely that the artists required a platform to release their music as within Scotland, there were limited options at that time.

Scottish record labels are not benefitting from the revenues generated by streaming services because no popular mainstream commercial acts are signed within Scotland. The BPI (2022) revealed that streaming accounts for 83% of music consumption in the UK, with vinyl records accounting for a quarter of all physical purchases. CD sales experienced a yearly decline of around 10.5% from 2020 to 2021, whilst vinyl and cassettes have increased by around 10.6% across both formats. Scottish label Rock Action Records released a number-one record from Mogwai in 2021; however, the sale of vinyl and CDs has been highlighted as the key to its commercial success (Beaumont-Thomas, 2021). A similar scenario occurred a year earlier when Gerry Cinnamon scored a number-one record. The first week sales were 28,945, with 6,629 coming from streams (Paine, 2020). Furthermore, Tiree Records disclosed that for thirteen million streams, they had received £64,964 over ten years, equating to around £6500 a year.

## *Manufacture and Distribution*

The impact of new technologies on the recorded music sector has significantly impacted distribution channels. Pre-internet record labels functioned as gatekeepers controlling the manufacture and distribution of recorded music across all genres; however, digitalisation has allowed musicians to self-distribute (Arditi, 2015; Eiriz and Leite, 2017). The opportunities arising from democratising distribution practices have permitted a significant range of music creators to make their music directly available to consumers. A new strategy and opportunity for artists has been to bypass the traditional record deal and sign to label services, which Gerry Cinnamon did via his own imprint, Little Runaway Records. By signing to label services, artists can retain the copyright to their songs. Rather than receive an advance, artists will pay to use the services depending on their campaign's size with marketing, promotion, and distribution available (Kirby-Welch, 2017).

Scotland has three digital music distributors: EmuBands, Birnham CD, and Threads of Sound. EmuBands and Threads of Sound exclusively distribute digital music, whereas BirnhamCD offers digital distribution, CD duplication, and vinyl pressing as additional services.

The rise in DIY artists has led to a revival of cassette tapes. Although this is not a significant economic driver, a manufacturer, Glasgow Tapes, provides this service. The demand and manufacture of cassette tapes have increased steadily since 2012, culminating in 80,404 UK sales in 2019. Although these figures are encouraging, it is worth noting that cassette tapes account for 0.1% of music consumption in the UK (BPI, 2020).

Within Scotland, music manufacturing services remain a long-standing weakness with no viable options for large-scale physical production. However, the small-scale nature of many labels based in the country suggests there is no actual demand for them, especially with the popularity of music streaming amongst consumers.



## *Recording Studios*

Recording studios are the most commercially viable businesses operating within the recorded music sector, as they still generate impressive revenues. Even with the decline in record company revenues, recording studios remain in high demand. It was assumed that home computers and digital recording equipment would significantly impact studios (Leyshon, 2009); however, that does not appear to be the case, with 96 locations still in use nationwide. Glasgow and Edinburgh are home to the majority; however, as identified in Appendix 10, the remaining companies are dispersed around the country, with several functioning as residential businesses for long or short-term stays.

A recording studio can be considered a "site where appropriate and available technologies are assembled and hired to musicians and producers for periods of time, for the purpose of sound recordings" (Gibson, 2005, p196). There are three identifiable stages to creating a commodified piece of music: the recording, the mixing and the mastering. The same person can perform all of these, although each task can be classed as specialised (Rutter, 2011 p67). During the 1980s, recording studios provided high levels of economic activity to the music sector in Scotland; however, by the late 2000s, the levels of cash moving through the Scottish economy from recording activity began to decline as record labels grew cautious of investing high levels of capital in new acts. Studios that could demand £1000-£1200 a day dropped their prices to £450 a day (Lamont, 2014).

Although revenues from recording studios have steadily declined, new studios continue to open, with the world-class Gorbals Sound Studio in Glasgow and Post Electric Studio in Edinburgh. Most available studios cater to rock, pop and traditional music with less emphasis on jazz or classical. Hopefully, adding two Scottish studios to the Miloco Roster will bring several artists north of the border. St Mary's Space is a renovated church just north of Oban, whilst The Black Bay Studio is on the Isle of Lewis and operates as a residential facility.

Recording studios remain important locations for music creators; however, as spaces, they are less significant than they once were. New technologies have lowered the barriers to music-making, leading to the "vertical disintegration of production" (Leyshon, 2014, p136). As a result, more artists record at home or in

mobile studio set-ups. C Duncan (2022) revealed that he records all his music on his laptop, working wherever he goes. Artist Malka (2022) works similarly; however, she only records her music whilst hiring a mixer as she does not have the skills to do so herself. By lowering the cost of production, music creators can use the cash to market and promote their releases. However, this does not mean that studios will become obsolete. Survey data reveals that recording studios are the second most utilised intermediary by music creators in Scotland. In this sense, they remain critical sites of cultural production, albeit in a more hybrid fashion.

One observation from collating the list of available recording studios in Scotland is the insular nature of bands who use them. Almost all spaces operate with Scottish-based artists. There is no incentive to travel to these facilities as only a few Scottish-based producers are known nationally. However, the owner of Black Bay Studios, based on the Isle of Lewis, has revealed that his space regularly has bookings from Belgium, USA, France and Germany (McLennan, 2023). However, this is likely due to the facility's representation within the Moloko Group, which represents recording spaces globally.

### *Record Producers and Engineers*

The role of record producers gained traction within popular music in the 1950s. Shuker identifies them as intermediaries "who directed and supervised recording sessions and who also frequently doubled as sound engineer" (2016, p45). All studios listed in this study come with an in-house engineer as standard. As studio revenue declined, many owners chose to operate their studios on a day-to-day basis as a way of cutting costs, which suggests that studios are struggling financially; however, data from Chapter Five reveals this to be contradictory.

Most producers have left the country to achieve success as there is not a thriving recording sector with commercial artists, with London a more targeted area for recording popular music. Stuart Crichton, originally from Ayr, is a leading producer and songwriter based in Los Angeles. His roster of clients includes the Backstreet Boys, Kylie Minogue and Kesha. In 2019, he was nominated for three Grammys due to his songwriting and production credentials. Rodaidh McDonald from Edinburgh, currently residing in Los Angeles, has produced and mixed number-

one albums for artists such as Adele, The XX and Vampire Weekend. McDonald also has a winning Mercury Music Prize album under his belt and a US number one album after working with David Byrne on his American Utopia album. The most successful producer from Scotland in terms of worldwide success continues to be Calvin Harris. Having produced tracks for Rhianna, Katy Perry and Dua Lipa, Harris is among the most in-demand pop producers globally.

It is evident that Scotlands studios are strongly leaning toward the rock and pop genres; however, many smaller studios cater to folk and traditional music, which has been rising in recent years. None of the engineers or producers identified in this study appear to have a Jazz or classical music background, although their skills are undoubtedly transferable across genres.

## Extended Enterprise

### Music Representatives

The following section will demonstrate that music representatives are critical stakeholders within the Scottish industries as they are directly linked to revenue generation for music creators. These include music managers, collection management agencies, publishers and live music agents. Determining which stakeholders to include in this section was challenging as publishers and live music agents could be placed elsewhere within the chapter. However, it was decided that in the Scottish context, they represent the business of music creators.

#### *Music Managers*

Twenty-eight managers were identified for this research, with almost all located between Edinburgh and Glasgow, with varying levels of experience, from small local bands to international touring acts. The most successful company in recent years has been Kingdom Management, which assisted in the discovery and development of Lewis Capaldi. The remaining businesses are all solo companies with a single employee except for A Modern Way from Edinburgh, which has two employees and GnR Management from Glasgow, which has three

workers. Although several commercial acts have managers in Scotland, most artists are represented by large management agencies out of the country.

Managers are the most effective asset that music creators can have as they effectively supervise and run their businesses. Often, managers will become affiliated with an artist early in their career, helping to develop them as artists and brands. Jones highlighted the multifaceted nature of a manager's job, explaining that "artist managers occupy the only position in the Music Industry which interacts with all other areas of activity and the individuals involved with them" (2012, p91), which suggests that a broad array of knowledge is required. Although it is assumed that artists can achieve a DIY career and negate the need for intermediaries such as managers, this is only possible until a particular juncture in their career, as working with someone with experience is critical. Hrcacs explains that "managers perform the more complex and important function of interpreting the marketplace itself and developing specific business strategies for their clients" (2015, p462). If music creators were to conduct all the necessary tasks, it could lead to a "corrosion of creativity" (McRobbie, 2002, p61). Therefore, it is crucial that a manager can take the burden of tasks and provide the artist with the freedom to be creative.

Although several high-profile acts in Scotland have Scottish representation, some have chosen to become affiliated with management companies elsewhere. Whilst there is no definitive reason for this, it is most likely due to the limited market in Scotland. Managers in London presumably have more extensive networks, opening the artist up to more business opportunities.

### *Live Agents*

A live agent is an individual or company that books gigs, tours and festivals on behalf of an artist via a music promoter. Their knowledge is essential in knowing which promoters to use, which cities to visit and which venues to play. The role of an agent has expanded beyond the live sector to include branding deals, podcasts and YouTube series' (Keenan, 2022). Live booking agents remain limited within Scotland, with only five agencies identified for this study. ATC Live have a Scottish office in Strathaven, operated by Colin Keenan. Besides North America, the agency operates globally, primarily looking after pop and rock acts. Lisa Whytock

runs Active Events, which has looked after folk and roots music since its conception in 1990. The agency also has a side operation of event management. It has seen them running Showcase Scotland at Celtic Connections, which generates around £2.2 million annually for artists appearing at the event (activeevents.com, 2022).

The increase in agents is a direct result of the growth of traditional and folk music. Although Lisa Whytock has operated Active Events since 1990, newer agencies from Craig Corse and Katch Holmes have helped to develop and promote Scottish acts nationally and internationally. There appears to be a direct link between the agencies, the export opportunities provided by the Showcase Scotland Expo and the artists, which can be traced back to the Feisean movement.

### *Collection Management Agencies*

Collection management agencies are organisations tasked with collecting revenues on behalf of rights holders regarding income generated through the exploitation of music (Harrison, 2021). Although PRS and PPL are based in London, they represent rights holders from Scotland too. The current guise of PRS for Music has been in operation since 2009, when both PRS and MCPS-PRS joined to become a single entity. The organisation's main objective is collecting revenues on behalf of songwriters, composers, and publishers. The funds gathered are then distributed back to an artist or publisher for various reasons, such as a public performance broadcast on TV or reproduction by another artist. However, dispersing funds is not the only role PRS undertakes, with the agency also supporting its members by influencing policy change within the Government.

Phonographic Performance Limited (PPL) is a music licencing organisation that collectively looks after 110,000 members within the UK. The organisation collects funds for musicians and Record Companies generated from recorded music. Businesses such as bars, restaurants, and gyms all require a PPL licence, which permits them to play music on their premises and is renewable annually. A joint venture between PPL and PRS for Music was launched in 2018 with the intention of streamlining royalties collection.

Whilst these organisations serve music creators and rights holders in Scotland, they also support the sector via the PRS foundation, which supports popular musicians via Creative Scotland and the Momentum Fund. Additionally, PPL are also an event partner for the SAY Award.

### *Music Publishers*

The role of a music publisher is to economically exploit music created by composers, producers, and songwriters in three ways: first, by providing licenses to individuals who wish to use music from an artist they represent. Second, they actively aim to place their artists' music in movies, adverts or computer games, and finally, they recoup revenues and distribute back to their acts (Harrison, 2021). The importance of IP was recognised by Simon Frith almost thirty-five years ago, who argued that "for the music industry the age of manufacture is now over. Companies (and company profits) are no longer organised around making things but depend on the creation of rights" (1988, p57).

Analysis of UK Music's annual economic reports (Edwards, 2020; Edwards, 2021) reveals that the revenues generated by music publishers are substantial; however, it is critical to illustrate that within Scotland, publishing is one of the most underrepresented sectors of business, with only eight companies identified with extremely low economic returns. Therefore, it does not deserve to be a core sector. The lack of activity significantly impacts Scotland's economy as the revenues generated by successful commercial artists are not retained within the country. Publishing activity in the UK generated £524 million pounds in GVA for 2019 (UK Music, 2020). However, as the next chapter will reveal, only £100,000 of income was noted for Scottish-based publishing companies for 2018.

### **Music Retail**

The following section will demonstrate how digital technologies have altered the music retail sector. Although not a component of the core music sector, music retail remains critical to creating and consuming music. The first section will investigate the sale of physical music, while the second section will discuss the importance of musical instruments to the music industries.

## *The Sale of Recorded Music*

According to the IFPI, recorded music sales hit an all-time high in 1999. As the internet and home computers gained popularity, the introduction of MP3 technology and the ability to share music files online led to the exploitation and illegal sharing of music (Daniel, 2019). Like the rest of the world, Scotland experienced a period of adjustment in the early 00s when digital music files could be bought and stored on digital devices. Although this was not a solution to the online sharing of files, it allowed music to be purchased. Customers could select to download one track as opposed to an entire album. Music fans utilised several variations of the Apple Music model (Prior, 2018) before the launch of streaming services such as Spotify in 2008. Spotify introduced a new method to consume music by introducing a subscription model. Users could select a freemium account that interspersed music with adverts or a premium advert-free account. Most digital music retailers, including Apple and Amazon, have now adopted this model (Marshall, 2015).

### Current Situation

The current situation within Scotland is comparable to the UK. The last remaining large music retail store, HMV, is still operating, although it has entered administration twice in recent years. Sunrise Records' acquisition of HMV means they also control FOPP, which HMV purchased in 2007 after entering administration. With HMV accounting for almost one-third of all physical sales in the UK, it would be a dramatic loss for the sale of popular music on the high street (Monaghan and Butler, 2018).

The resurgence of vinyl records has positively impacted independent record shops in Scotland, providing them with "market relevance" (Hendricks, 2016, p481). The BPI (2021) reported the sale of around five million vinyl albums in 2021, noting that they are at their highest in over three decades. The revival has undoubtedly aided in businesses' longevity, although this could also be linked to the closure of nearby premises. Several longstanding retailers (Avalanche Records, Coda Music, Lost Chord and One Up Records) have closed in the previous ten years, which may

have inadvertently helped other independent stores in their respective locations. Several retailers have begun selling their stock online to boost their revenue. LoveMusic in Glasgow and Assai Records (Glasgow, Edinburgh and Dundee) operate online stores, indicating a desire for in-person and online purchase experiences.

Across Scotland, forty-three independent record stores operate with a strong presence primarily Glasgow and Edinburgh. Each year, around sixteen Scottish stores participate in Record Store Day (RSD), a celebration of independent stores. At its core, the event is about connecting brick-and-mortar stores with dedicated record collectors. Each RSD has a run of limited, often exclusive products that are only available in-store. Additionally, several retailers schedule live performances from local or touring acts, which provide specific events with more coverage than others (Bates, 2019).

One domain this study does not analyse economically is the market for second-hand music sold online on sites such as eBay or in charity shops such as Oxfam.

### *Instrument Makers*

The production of musical instruments is an under-discussed topic within previous mapping reports. However, an initial investigation revealed a moderate turnover of revenue, hence the inclusion in this study. The market for making instruments in Scotland is relatively limited for popular music. Moon Guitars is the most recognised luthier, operating since 1979. Although their speciality is acoustic instruments, they have built custom electric instruments on request. Moon Guitars has created instruments for musicians of all genres with clients including Paolo Nutini, Bryan Adams, Adele, Scissor Sisters and Simple Minds. The most lucrative businesses construct instruments for the traditional, folk and Classical markets, with bagpipes and violins constituting the most considerable suppliers (Appendix Twelve). The demand for these types of musical instruments signifies the on-going popularity of more traditional genres within Scotland.



## Music *Instrument* Retailers

Musical instruments often feature only a passive role in discussions regarding music sectors; however, Schmuck argues that the recording sector relies on producing and retailing musical instruments as it "provides part of the technical equipment used for the production of music in the studio" (2012, pXIII). Although the same theory could be applied to live music, technological advancements and the popularity of specific genres indicate that only some play instruments live. For example, DJs and producers use audio equipment to play pre-recorded tracks. Although the Internet has become a marketplace for new and used instruments, retail premises remain a meaningful social space for musicians. Two large retailers operate in Scotland, Guitar Guitar and Kenny's Music. Guitar Guitar is the largest UK retailer, with seven stores around the UK and three based in Scotland. Kennys Music is a Scottish-based company that runs four stores in Glasgow, Dunfermline, Aberdeen and Dundee. The remaining retailers are all independently owned and dispersed around the country. However, the main cities have an apparent concentration, which is understandable based on the location of music venues and touring musicians. Interestingly, audio recording equipment is the highest area of music instrument sales, with 16% of the total UK market, whereas guitars and ukuleles make up 14.3%. Orchestral stringed instruments are still highly prevalent, with 12.5% of total sales (Rai, 2019).

Although less prolific than it once was, Sheet music has been included in the instrument retailers section of economic activity, with multiple shops stocking it alongside other musical items. Alba Musick is the one remaining specialist with two stores, one in Glasgow and one in Edinburgh. The decline in physical sheet music has coincided with the rise of digital content, which suggests it is now accessed online.

## Business Ecosystem

### Funding and Development

This section will examine various funding and development opportunities for music creators and businesses in the Scottish music industries. Previous music maps have often negated the significance of funding and development opportunities within the national context; however, the subsidies often make their way back into the commercial sector, so examining their distribution is critical. The following section will illustrate that whilst the state is not a direct element of the music industries in Scotland, it provides exceptionally high levels of fiscal support, which specific genres rely on to avoid market failure.

#### *Direct-State Funding*

Scotland has five National Performing Companies. Scottish Opera, The Royal Scottish National Orchestra and The Scottish Chamber Orchestra all have strong music components. Scottish Ballet and Scotland's National Theatre are still relevant as they have a musical element to their delivery. All five companies utilise their funding in various ways, such as paying musician wages, purchasing goods and hosting events, which, in turn, directly impacts the Scottish economy. The SG distributed £22,490,000 amongst all five agencies, which expended over £37 million back into the Scottish economy (Scottish Government, 2018a).

A financial crisis with Scottish Opera in 1999 led to the direct state funding of all NPCs. The Culture Secretary, Fiona Hyslop, explained, "We are recognising the on-going valuable contribution made by the National Performing Companies to our national cultural life and their ambassadorial role showcasing examples of our talent to the world" (ibid, 2018). Although this is a sufficient rationale for continual support, the same argument could be provided for other genres of music that do

not receive comparable levels of fiscal support. The state's backing of classical music is significant as it implies that one genre merits support whilst others are resigned to market forces. With around 63% of the NPC's income for 2018 coming from government revenue and project funding, it remains to be seen whether they could survive without financial assistance.

### *Arm's-Length State Funding*

Creative Scotland (CS) is a reasonably new body, taking over from The Scottish Arts Council after its dissolution in 2010. Although facing continual criticism in its formative years (Ferguson, 2019), the agency has found stability by implementing a new regular funding channel for long-term support for art projects. CS distributes funds via open project funding, regular funding, and targeted funding. Open project funding offers individuals and organisations between £ 1,000 and £100,000. Regular funding is a three-year grant provided to organisations to stabilise businesses and allow for long-term strategic planning. Targeted funding supports areas of the arts that are struggling or in need of development (CreativeScotland, 2021a).

The open fund for individuals is the primary grant source for music creators applying to CS. Fiscal support can be received to help with recording costs or touring costs. Analysis of Creative Scotland's monthly awards indicates that most genres, including popular music, receive support. However, these awards are delivered for one-off projects without indicating career progression. Analysis of the regularly funded organisations (Appendix Fifteen) identified a pattern of support for specific genres, such as traditional, jazz and classical music. Traditional music, in particular, is "supported to create clear progression paths from the grassroots level of the Feisean movement, through the all-age sector celebration of Hands Up for Trad, to the world-class stage of Celtic Connections" (Creative Scotland, 2018). Support for traditional music is understandable as it generates high revenues for the live sector and is a significant export resource (Whytock, 2022).

It appears that CS functions in somewhat of a grey zone as its mission is to support diverse cultural activities across Scotland while implementing the SGs goal of "increasing sustainable economic growth" (Scottish Government, 2014)). In

this sense, creativity may often be overlooked in favour of attaining fiscal goals outside the creation of music, which is more aligned to the SGs NPF.

### *Non-State Funding*

Non-state funding is available from organisations nationally and outside the music industries in Scotland. The PRS Foundation supports popular musicians and artists to provide development opportunities in their early careers. Having distributed over £37 million to 7300 applications since 2000, the PRS Foundation continues to be the principal funder of popular music in the UK, with £3 million distributed from PRS for Music annually. 2018 saw Scottish artists receive funding from four channels: The Momentum Music Fund, The Open Fund, Beyond Borders and The Talent Development Partnership. It is significant to emphasise that before PRS, there were no dedicated funds specifically to support music creators.

Many additional funders are willing to help the creative arts in Scotland, with several trusts and foundations in place to nurture and develop musicians. However, many of these awards target traditional and classical musicians (Appendix Seventeen). Support for Scottish artists is available from the UK, as was evident with The PRS Foundation; however, this also extends to other organisations such as The Collard Fellowship and The Tillett Trust.

Although CS and The PRS Foundation reveal the recipients of their awards, many others do not. Therefore, it is impossible to show accurate data at this stage.

### *Business Development*

Scottish Enterprise (SE) is Scotland's primary economic development agency offering advice and fiscal support to new and existing businesses across the digital and creative industries. Understandably, SE targets larger, dependable organisations to boost the Scottish economy; however, as music is a problematic industry regarding the projection of future earnings, it has had a fractured relationship in the past (EKOS, 2013). To date, there is no identifiable music policy.

The Highlands and Islands Enterprise (HIE) function similarly to SE; however, it serves the north of Scotland and surrounding areas, offering support to businesses, community organisations, and social enterprises. While music is not currently one of the north's leading sectors, it has been identified as a potential growth area. The HIE has received praise for funding commercial music activities through Xpo North (Interview 1, 2021). Therefore, it remains unclear why SE cannot offer similar levels of support, considering both agencies have a similar remit.

## Networks and Agencies

A collection of networks and agencies operate across Scotland and the broader UK to promote and develop the music industries in Scotland. Although several receive funding to operate, they have no direct economic impact on the music industries. Instead, they create value by nurturing and educating musicians and other industry professionals.

### *Development Opportunities*

The primary music development agency in Scotland is the SMIA. The core aim of the agency is to strengthen, empower and unite Scotland's music industry. The Scottish Album of the Year Award (SAY) is the SMIA's flagship event celebrating the best Scottish albums. The SMIA has been restricted in their activities over the previous few years due to a change in personnel and the impact of Covid-19. The music sector in Scotland is complex as it incorporates a diverse range of stakeholders with a range of needs. Therefore, it remains to be seen how the agency plans to speak on behalf of everyone across the commercial and private sectors.

The Scottish Music Centre (SMC) is an internationally recognised agency that preserves Scotland's musical history through its archival service and operates as a de facto publisher for local composers. The SMC helps musicians and stakeholders across the industry with development opportunities. However, its work with young and disenfranchised children nationwide is most impressive. There are several development agencies that specialise in particular areas, such

as Scottish Women in Music (SWIM), who are striving to level the playing field. The organisation is made up of music creators and intermediaries working in the broader music sector. Another great organisation, We Are Here Scotland, is based in Aberdeen. The charity seeks to grow the BPoC community's representation amongst Scotland's creative industries. Data in chapter seven will demonstrate why both this organisation and SWIM are crucial to developing a fair and diverse workforce in the music industries.

A number of music conferences and networking events occur in Scotland annually, encompassing live music, seminars, and keynote speakers. Resonate and Wide Days cover popular music, whilst the newer conference, PITCH, supports hip-hop and underground culture. Showcase Scotland is the most expansive event, accommodating 180 guests annually from around the globe to witness performances from around sixty Scottish artists from the traditional and folk genres with the possibility of commercial relationships around the globe. The number of networking events and conferences has grown since previous mapping reports, indicating the expansion of music activity nationwide.

Several UK organisations also represent the interests of Scottish music creators or have Scottish business members.

- UK Music
- Musicians' Union (MU)
- Concert Promoters Association (CPA)
- British Association of Concert Halls (BACH)
- British Arts Festivals Association (BAFA)
- Music Managers Forum (MMF)
- Music Publishers Association (MPA)
- British Association of Songwriters, Composers and Authors (BASCA)
- Music Producers Guild (MPG)
- British Phonographic Institute (BPI)
- Association of British Orchestras (ABO)
- Association of Independent Music (AIM)

### *The Youth Music Initiative*

Music education plays a crucial role in the Scottish music industries. Although initially delivered as part of the SG's cultural provision, music education is often the first step towards a music career, with more than two-thirds of music creators surveyed for this thesis reporting early music tuition. A 2003 report, *What's Going On*, led to the formation of the Youth Music Initiative (YMI), which provides music access to individuals until 25 years old, covering preschool, primary school, secondary school, and beyond (Broad et al., 2003).

Creative Scotland funds the YMI, with around nine million pounds for its annual projects covering three distinct areas: music-making within a school, music-making outside of school and strengthening youth music in general. In 2017/18, £7.2 million was distributed to local authorities with funding accessed via the formula fund to deliver music activities within schools (see Appendix Sixteen). The Access to Music Making fund received 103 applications, although only 45 were successful, with £1,558,250 distributed among recipients. The final fund, Strengthening Youth Music, received ten applications. Only three were successful: Drake Music Scotland, Enterprise Music Scotland and Feis Rois, who shared £40,613 (Creative Scotland, 2021).

*What's Going on Now* (Broad et al., 2019) has identified several improvements to the delivery of music tuition within Scotland since the original *What's Going On* report in 2004. First of all, the period of 2016/17 saw around 244,000 children and youths taking part in the YMI, with 202,000 of these occurring within a school setting, whilst the other 42,000 were involved with out-of-school activities. Over 60,000 young people received music tuition from the Instrumental Music Services in 2017/18, which is around a 10% increase from 2002/03. The informal and non-formal sectors also saw an estimated 50% participation increase in youth music activities from 2002/03 (Broad et al., 2019).

Whilst the uptake of music tuition is encouraging, deep-rooted systemic issues reveal a troubling trend regarding social class and access to music tuition. A large sample of tutors, teachers, and mentors (631 responses) revealed that 94% of respondents noted financial barriers that prevent young musicians from

participating in music-making activities. Feedback from case studies highlighted the lack of uniformity across local authorities, with some providing free tuition whilst others charged "prohibitively high rates" (ibid., 2019, p16). A similar report conducted on behalf of the MU (2018) identified a similar trend. The data revealed that families who earn less than £28,000 a year are 50% less likely to have a child learning an instrument than families who earn over £48,000 a year. Additionally, children from affluent families were encouraged to learn an instrument more than those from working-class backgrounds.

### *National Youth Organisations*

Scotland appears to have a healthy youth music sector where the highest calibre of musician's audition annually to join prestigious groups. Although the auditions are open to the public within the specified age range, a thorough level of formal training is required, which suggests that those from affluent households with the necessary resources to purchase an instrument and provide long-term lessons have a higher probability of acceptance.

Six youth organisations perform nationwide, receiving funding from various channels, including direct from Creative Scotland, the YMI, The National Lottery, subscriptions, and independent fundraising.

- National Youth Brass Band of Scotland
- National Youth Orchestra of Scotland
- National Youth Jazz Orchestra of Scotland
- National Youth Choir of Scotland
- National Youth Pipe Band
- Feisan nan Gaidheal

These organisations have connections to other education and performing institutions and serve as stepping stones for many musicians who want to pursue music as a career in performance or composition.



### *Formal Music Education*

Composing is often a taught activity, with several higher education institutions offering courses nationwide. The renowned Royal Conservatoire of Scotland (RCS) specialises in the performing arts and offers various levels of training. The QS university ranking system recently placed the RCS in the top three performing arts universities globally (RCS in the world top three for performing arts education, 2021), indicating that it is not unusual for international students to attend. The University of Edinburgh, The University of the Highlands and Islands and The University of Aberdeen all offer programs similar to RCS; however, the RCS remains the most prestigious. Only a small selection of students can attend these schools because the long-term investment and financial resources can be limiting. Although there are scholarships available, the level of technical ability required demands a high level of training, which suggests that entry to particular establishments is difficult due to socio-economic status.

The Scottish Government promotes four centres of excellence for children deemed talented enough to attend: The Douglas Academy Music School in East Dunbartonshire, the City of Edinburgh Music School, the Aberdeen City Music School, and Sgoil Chiùil na Gàidhealtachd (National Centre of Excellence in Traditional Music) based in the Highlands (education.gov.scot, 2022). Many of those who attend often go on to one of the HEIs around the country. Although the RCS is often the first choice for many, several institutions offer similar studies in composition and performance, such as Edinburgh University and The University of Aberdeen. A new addition to the performance-based degrees is the Music Industries courses. These give students the knowledge and skills to enter the sector, emphasising enterprise rather than performance. These are offered nationwide, with The University of Glasgow, The University of the Highlands and Islands, The University of the West of Scotland and Napier University all providing outstanding educational opportunities.

## The Media

The final section will analyse the media's role in the Scottish music industries. As Williamson et al. noted in a previous mapping report (2003), valuing the sector would be almost impossible; however, the media's ability to act as gatekeepers and tastemakers has historically placed them in a favourable and dominant position. This section was almost removed from this chapter; however, survey data indicated that music creators continue to value traditional media sources, hence their inclusion.

Whether print/digital media, TV or radio, cultural workers can shape the public's tastes and generate value through their assertions (Dumbreck, 2016). However, significant technological changes to media consumption have raised questions regarding Bourdieu's argument that cultural intermediaries have "control over the mass media" (1984, p325). Although critics across all media forms can impact economic returns for music creators through an excellent critical appraisal, they are more influential in assigning status and prestige (Cameron, 1995). Therefore, this section will examine the changing relationship between the various media groups, demonstrating how the Internet and subsequent new digital technologies have affected the music industries in Scotland.

### *Broadcast and Digital Radio*

Radio was the dominant means of discovering new music from popular artists for over a century. Negus illustrates that it was traditionally radio play "which has encouraged retailers to stock recordings and consumers to purchase them" (1992, p101). However, due to new listening formats, radio support is less crucial than it once was for promoting music due to the decline in listenership. The BBC has disclosed that the 16-35 demographic is more engaged with music streaming platforms such as Spotify than all their stations combined (Sweney, 2018). Additionally, Spotify has been labelled the "new radio for the influence it has on breaking new songs and artists, and for the important role it plays in music discovery and consumption" (Prey et al., 2022, p75). Although both authors suggest a shift in listening habits, music creators remain committed to receiving

airplay for their music, as highlighted in the survey results. The most likely reason for this is the revenue accrued from spot plays on the radio and the limited returns for independent artists from streaming services.

This research has identified 148 radio stations across Scotland, covering broadcast and digital programming. Scottish Radio Holdings was the most extensive media company nationwide until it sold its assets, including twenty-two radio stations, to Emap in 2005. However, by 2007, they had been sold again to the German-based Bauer Media Group (McNally, 2007).

BBC Radio Scotland remains a positive voice for new music in Scotland. Roddy Hart hosts *The Roddy Hart Show* and *the Quay Sessions*, which covers contemporary and classical music. Phoebe Inglis-Holmes and Shereen Cutkelvin have taken over from Vic Galloway as the hosts of *BBC Introducing*. Overall listenership declined by 20% between 2021 and 2023 (Garcia, 2023) with several cuts to shows from the jazz, classical and traditional genres (Ferguson, 2023). BBC Scotland insists it is committed to supporting all genres; however, the programme cuts suggest it is more concerned with listening figures than delivering a diverse range of music. The remaining large stations, such as Clyde FM, Tay FM, and Northsound, have become established promoters of popular music rather than showcasing new or alternative music.

The unfortunate fact remains that although there is support for emerging musicians, it is not at a level that could positively impact their careers. Whilst the breadth of music programmed by the BBC is impressive, they have yet to provide a long-term strategy for supporting new music. Understandably, the DJs who host radio programmes often have little input on what music they can play, with producers frequently programming the playlists.

Furthermore, the ability to implement change does not lay in Scotland, as broadcasting policy remains an issue for Westminster. However, if that power were to return to Scotland, the country could benefit from following in the footsteps of Canada or France, where radio stations are required to playlist a percentage of acts from that country, which is implemented based on the idea of protecting national culture (Schofield, 2015). It would also provide a higher revenue stream back to Scottish music creators and, therefore, into the economy.

## *Broadcast TV, Web TV, and Video*

Simon Frith noted the importance of television, arguing that it was "an essential part of the star-making machinery of the music business" (2002, p277). That was true then, but the media landscape has transformed with limited opportunities for dedicated music shows other than reality TV shows. The BBC is primarily responsible for highlight reels from TRNSMT Festival or Belladrum Festival; however, BBC Alba has a selection of music shows with *Seirm* and *Port* showcasing local traditional and folk music. The situation improved in 2018 with ALT TV, which had a format similar to Jools Holland. Each show featured an established Scottish headliner, with up-and-coming talent gaining exposure. STV had the Grass Roots Music Show, highlighting new and emerging talent through interviews and acoustic performances. However, the show is no longer in production.

The data suggests that there is no demand for music-related shows as the content is available on YouTube and other streaming on-demand services. A new revenue stream for music creators and rights holders has come from music placement in a TV or web show (Shuker, 2016). These synchronisation opportunities can generate high revenue and offer exposure on a large scale. Those who seek out music content are known as music supervisors. Their roles have expanded "as popular music has taken on greater importance across screen media, including television, advertising, and gaming" (Klein and Meier, 2017, p280).

## *Press*

The role of music journalists has historically revolved around reviewing recorded music and live performances. Often regarded as professionals, a positive review could legitimise an artist and boost their profile. Frith (1983) argued that journalists were key intermediaries and integral to the music industries by assigning meaning to cultural texts. However, the move to online content delivery has democratised the critic's role because social media has permitted non-professional writers to provide their opinions, acting as de-facto journalists. Shuker contends that "the traditional music press remains significant" but that their role has been "modified by the advent of online music magazines" (2016, p161).

Although the circulation of newspapers continues to decrease, their impact and influence on the arts sector has gradually declined. Magazines are in the same position as newspapers in terms of circulation. Long-term publication, *Is This Music*, has now become an online magazine, with *The Skinny* delivering its service online and in physical form. Having launched in 2005, they aimed to deliver independent cultural journalism by helping their readers make discoveries across the arts. The decline of press media has impacted the UK, with *The NME* and *Melody Maker* ceasing to exist. *NME* did make one last attempt to stay in circulation by rebranding to a free magazine, similar to *Is This Music*, although it made no difference to its fate. Simpson (2018) believes that the decrease in music magazines is simply a recalibration of what the public wants, with smaller, genre-specific publications now the primary focus of sales. While the data points to a decline in print media across the board, there has been an evident increase in online reviewers too, which "demonstrates the opportunity for listeners to position their opinions next to a choir of professional music journalists" (Lange, 2016, p245). In this sense, there is still a demand for music reviews, albeit in a hybrid fashion.

## Summary

The media sector can still impact individual taste, although not at the levels witnessed in the 1980s or 1990s. Digital technologies and the widespread use of the Internet have enabled anyone to become a generator of taste through mediums such as blogs or podcasts; however, there is still a place for traditional media. Many media outlets (including the BBC) have grown and adopted a multiplatform approach to their portfolio to ensure longevity and unlock new revenue streams (Schlesinger and Doyle, 2015).

## Conclusion

This chapter has explored the Scottish music industries by investigating seven independent, sometimes overlapping sectors: music creators, live music, recorded music, retail, funding and development, the media, and music representatives. By systematically investigating these sectors, it is evident that the music industries in

Scotland is a complex web of intermediaries revolving around those who create music and those who exploit music.

Music creators remain the crucial element as it is they who create the product which is utilised by the remainder of the sector. Live music is the most robust sector in Scotland also generating the most revenue for music creators. While recorded company revenues have declined, the demand for record music remains high, as evidenced by the number of recording studios. However, issues remain regarding the production and distribution of physical music. Music managers are crucial for music creators as they essentially run their businesses. As a result, this means that they must have a full working knowledge of the music industries. Music publishing in Scotland remains a weak area with only one commercial publisher of scale. Cultural activities are well served via CS; however, there is no popular music policy to grow and develop the sector. However, the YMI remains one of the best music programs in the country for supporting early-career musicians and introducing children to music.

There are notable absences from the mapping chapter, such as photographers and videographers. Although these creative tasks are necessary within any music economy, they ultimately fall into other creative sectors, particularly their economic impact. The aim of this chapter was to reveal a map of music activities within Scotland. To answer the first research question of this thesis, the following chapter will build on this chapter's research to investigate and estimate the economic worth of the music industries in Scotland for 2018

## Chapter Five: Measuring the Scottish Music Industries

Whilst the previous chapter sought to identify the key sectors in the Scottish music industries and explore them, this chapter will further examine those sectors and identify their financial worth to the economy in Scotland based on estimations for 2018. The first task was to specify the various income streams within each industry sector. This thesis closely follows UK Music (Edwards, 2021) and its sector definitions for uniformity; however, several differences are worth noting. UK Music's report is based on the ideology that four commercial assets define the UK music industries and, as a result, create economic value. These are a written song or piece of music, a sound recording, a live music performance and a musician or artist as a brand. Although this thesis accepts the four assets as accurate, previous Scottish research has emphasised "challenges in retaining intellectual property (within the sector) for subsequent commercialisation" (Ekos, 2013, p53).

In order to estimate the economic worth of the sector, this chapter will utilise an ecosystem model (Moore, 1993), which will extend the economic analysis beyond the core activities of live music and recorded music. The fundamental distinction between this research and that conducted by UK Music is the inclusion of funding from CS and the SG, which will be incorporated into the final economic estimation. By highlighting the elevated levels of funding distributed into Scotland's music industries, this thesis will be able to identify where the market operates and where intervention is required.

The first task was assembling a database of Scottish music businesses that correlate with the sub-sectors recognised in Chapter Four. Whilst every effort has been made to produce an exhaustive list, there will undoubtedly be some smaller businesses that have yet to appear in the search. Therefore, it is essential to envision the research as a snapshot that future research can utilise and build on.

Sourcing accurate and reliable data is a fundamental challenge when measuring an industry's economic worth. What is available, especially from government agencies, is not easily mappable to individual projects (EKOS, 2011). The UK government supplies economic estimations of the music industries using the

standard industrial classification codes (SIC) and the standard occupational codes (SOC), which are part of the Office for National Statistics (ONS). The original DCMS mapping reports (1998; 2001) used economic data from these sources to estimate the worth of the creative industries and their separate sectors; however, over time, it became apparent that this method does not always translate well for the music industries given the myriad of various roles and the limitations of the SIC and SOC codes. UK Music emphasised these challenges, explaining that “the music industry is unhappy with how the government defines it. One major problem is that it is grouped with the performing arts” (Todd, 2013).

There are instances when SIC and SOC codes are used to estimate economic data, with recent research from Creative Wales (Todd et al., 2022) applying a hybrid method of ONS data and a bespoke methodology utilising data from UK Music. Whilst this thesis could apply a similar research strategy, the decision was made to use a bespoke methodology based on a request from the partner organisation. The SMIA wanted a database of all music businesses in Scotland which fall within the sectors outlined in Chapter Four. Going one step further, I also provided a list of all available music creators. In doing so, I wanted to reveal the income discrepancies amongst each business within that sector to reveal that only some generate high revenues. Ultimately, this would be valuable data to analyse rather than an overall figure based on SIC and SOC codes.

Additional sources were analysed for data, such as the Businesses in Scotland report (Scottish Government, 2018b); however, the report is limited to the number of businesses operating with no specific sector information. The analysis of independent sources such as Data City was also unsuccessful in sourcing reliable and robust data.

A mapping toolkit document from The British Council highlights the difficulties of data collection for mapping reports, explaining:

“If reliable data is not available, as is the case in some emerging (and even developed) economies, the suitability of non-governmental statistics needs to be explored. This might be data collected by trade associations or industry bodies, by trade publications or online networks, or by NGOs, private businesses or



universities. By patching such data together, it may be possible to create workable datasets for a mapping exercise” (BOP Consulting, 2010, p27).

Due to the lack of reliable data, the subsequent dataset was sourced using desk-based research across numerous mediums such as websites, publications, reports, and interview data (Appendix One to Twenty). Previous research by Williamson et al. (2003) adopted a median technique to identify the centre point of a specific dataset. As there are several outliers in the data, this is the most appropriate method to calculate a portion of the analysed sectors.

Another area for improvement with this type of research is ensuring data is not double counted across sectors, boosting the music sectors actual worth. Research has highlighted the issue (Williamson et al., 2003; Cloonan et al., 2004; Page and Carey, 2009; UK Music, 2021); however, no method has been proposed in the literature to date.

The upcoming sections of this chapter will explore revenue streams based on five of the seven sectors analysed in chapter four: music creators, live music, recorded music, music representatives and music retail. The funding of music activities within Scotland will also be examined and presented. A further investigation of the multiplier effect will then demonstrate the reach and impact of live music on local economies. Although chapter three sought to define the overarching methodology applied to this thesis, the following economic estimations will feature separate methodological choices followed by the economic results.

## Income for Music Creators

Estimating revenue for music creators is the most problematic aspect of this thesis due to the number of revenue streams available and the ways revenue is generated in the new digital climate. Whilst Hesmondhalgh concludes that “it is impossible to calculate average (mean) or typical (median) earnings with any accuracy” (2021, p28), the following section will endeavour to reveal the income streams utilised by music creators within Scotland.

Clarity is required to define what is implied when discussing Scottish music creators. Essentially, they must have been born in Scotland or resided there for at least ten years. Although the demarcation from amateur to professional is blurred, music creators were only included if they generated revenue for 2018, released a single or a full LP, or performed live.

Commercial music is an industry where a small percentage of creators are highly successful (Elberse, 2013). In 2013, the top 1% earned around 77% of all the revenues generated (Mulligan, 2014); however, this differs for the average musician. In 2012, a musician’s average wage was less than £20k (Musicians Union, 2012). By 2018, this had risen to £23,059, which remains below the average national salary (UKMusic, 2019). It is worth noting that these estimates are likely based on London musicians. The Scottish equivalent is likely lower.

There are nine revenue streams available to music creators in Scotland based on current research from Hesmondhalgh et al. (2021). The data was incorporated into the survey for this thesis, which had the option of “Other”, where respondents could add additional revenue streams. Although several individuals did, none were considered worthy of further investigation as they often involved sectors unrelated to the music industries (Question 113a, 2021). Additionally, the data is based on revenue from 2018, before the sale of Non-Fungible Tokens (NFTs), which is why it was excluded from the list.

<b>Music Creator Revenue Streams</b>
Live performance fees
Education/teaching work
Commissions
Grant income
Royalties from recordings
Royalties from publishing/synchronisation
Session fees
Fees for recordings (advances)
Merchandise

## Advances

An advance is a pre-payment of royalties from a recording or publishing contract, recoupable against future earnings. Essentially, the advance is a loan to a songwriter or artist to live day-to-day until they receive royalties from future sales. Royalties will be paid once the advance has been fully reimbursed in the case of recorded music; however, it can be concurrent with a publishing deal. (Strasser, 2010).

The quantity of advance payable is often calculated using the Min-max formula applicable to recording and publishing deals; however, this is often only relevant to a second album. The company will often analyse the number of albums sold by the artist, and if, for instance, it was £100,000, they will offer 70% of that figure, £70,000. The minimum they can offer would be 50%. If the artist only sold £40,000 worth of records, they would still receive £50,000 in advance (Harrison, 2021, p101).

The previous Scottish mapping report (Williamson et al., 2003) identified various levels of advance ranging from £5,000 to £1,000,000, dependent on numerous factors, such as the type of record label and the number of records they were expected to sell. However, the decline in physical album sales has resulted in far lower advances because recouping costs has become more complex. Analysis of the Scottish sector reveals only one act likely to have received an advance in 2018, The Snuts, who signed with Polydor. Considering the record label the Snuts signed with, they are estimated to have received around £100,000. All other signings were on independent labels where no advances would be available.

<b>Estimated advances for music creators in 2018</b>	<b>£100,000</b>
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## Master Recording Royalties

Although artists can keep the rights to their recordings, they are often signed away to a record company for an agreed period in return for the recording, marketing

and distributing of their music. Whoever owns the rights will generate revenue whenever the music is downloaded, streamed or bought in a physical copy. Royalty payments occur between "a user (licensee) and an owner (licensor) for the sale or performance of the use of intellectual property" (Strasser, 2010, p133). The record label then provides the musicians who performed the songs a percentage of all monies generated by exploiting these recordings once initial costs, such as an advance, have been recouped (Arditi, 2020).

It is vital at this stage to discuss the lack of financial data on record companies. The problem is not specific to Scotland; it is global. In order to identify royalty payments, access to individual artist statements is required. Therefore, it is more appropriate to acknowledge the gap and not theorise.

Phonographic Performance Limited (PPL) collects a second stream of revenue connected to the usage of recorded music in public, the broadcast of music on TV and radio and the reproduction of recorded music for broadcasting or in public (PPL, 2021).

The total income received by PPL in 2018 was £210,100,000. Scotland has around 5500 members (Annual Review, 2019) from a UK total of 105,192. Therefore, if we divide the total income by total members and multiply it by Scottish members, we can assume the total revenue generated for recorded music to be in the region of £10,983,500. However, the figure is for all Scottish musicians living within the country and internationally. There is no way to estimate the percentage relating directly to those remaining in Scotland. Once again, it is vital to acknowledge and highlight the problem as it may be possible to correct this in future research.

PPL Income					
Total PPL income	÷	Total members	X	No. of Scottish members	= Total

<b>PPL Income for Scottish-based Musicians in 2018</b>	<b>£10,983,500</b>
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## Publishing Royalties

Music publishing began with the sale of sheet music but has grown into a complex web of "intangible rights associated with intellectual property" (Strasser, 2010, p116). Whether Songwriters and composers self-publish or sign with a publishing company, four key revenue streams are identifiable: performance royalties, mechanical royalties, Synchronisation royalties and revenue from the production and sale of sheet music. The royalties are distributed by PRS for music, which includes the Mechanical-Copyright Protection Society (MCPS). A percentage of all revenue streams are paid to the rights owner and the author. Once an advance or costs are recouped, the rights owner often provides the author with additional revenue (Harrison, 2021).

The income from performance royalties originates when a live music performance occurs publicly or if a musical composition or song is broadcast on radio or television. Rates vary for broadcast fees, with Radio One paying a higher price than an independent station. When music is played in bars or shops, they must also pay a blanket licence fee.

The PRS published their fees for a live performance based on venue size (Live performance royalties, 2021):

<b>Venue Type</b>	<b>PRS Fee</b>
Small venues and gigs	£10 per show fixed rate
Buskers	£1.47 per session
Popular concerts	4% of box office fee is divided to allocate each song a value for the number of seconds played
Classical concerts	Two different methods used: (a) a flat rate of 4.8% from box office receipts, or (b) a sliding scale based on copyright works performed (Currently, this is around 8% of box office receipts)
Festivals	The royalty rate is a mix of those used for popular concerts and classical concerts

The second income stream is generated from mechanical royalties collected for the sale, stream or download of music. Historically, music was manufactured; however, in the digital age, music is available digitally too; therefore, music licenses have developed to include additional mediums such as podcasts (Harrison, 2021). The third revenue source is synchronisation opportunities. Again, offered in the form of a licence, movies, TV shows, and advertising can apply to the rights owner (publisher or writer) for permission to use their music with visual images on screen. The amount offered can vary from £10,000 to £100,000 (ibid, p280). The final revenue stream is from the production and sale of sheet music; however, this is usually only licensed by classical music publishers and is not regarded as a large revenue source.

The total income from PRS in 2018 was £746 million. The breakdown is as follows:

<b>PRS Income for UK members in 2018</b>	
International	£280.6 mil
Public performance	£192 mil
Broadcast	£127.7 mil
Online	£145.7 mil
<b>Total</b>	<b>£746 mil</b>

However, after costs, that figure decreased to £648.4 million. Registered Scottish members account for 6.89% of that number (PRS, 2019). Therefore, the total revenue distributed by PRS to Scottish musicians was in the region of £44,674,760. Similarly to PPL payments, the figure provided is for all Scottish artists; therefore, estimating a figure for those living in Scotland is not possible.

<b>PRS Income for Scottish-based Musicians in 2018</b>	<b>£44,674,760</b>
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## Live Shows

Desk-based research revealed 182 bands and artists performing in Scotland. Companies House provided financial details for several high-profile acts regarding their touring income (Appendix One). The remaining artists were analysed online via their Facebook profiles to estimate the number of shows played for 2018. The data was then cross-referenced with SongKick and Setlist FM to provide more conclusive results.

An average ticket price was placed on each artist by analysing online ticketing companies and the venues where artists would perform. With this data, an estimation of each of their touring incomes could be estimated by multiplying their number of gigs by the size of venues and then multiplying that figure with the ticket price.

Total ticket revenue					
Average ticket price	X	No. of gigs	X	Size of venue	= Total promoters' revenue

However, that figure only calculates what the promoter would generate from ticket sales. It is estimated that a deduction of 30% should be applied for running costs. The remaining figure can be split 85/15 in favour of the music creator (Forde, 2017).

Total ticket revenue		
Total promoter revenue	-30% for operating costs	85/15 split in favour of music creator

<b>Total revenue generates from live shows for Scottish-based artists and musicians in 2018</b>	<b>£11,566,323</b>
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Estimating the revenue generated by music festivals for Scottish music creators was more challenging. By examining the line-up of each event, it became evident that there were only a few Scottish headliners with minimal Scottish acts high up the bill for commercial festivals. Although the research identified that artists receive 25% of the total income, only a proportion will go to Scottish artists. There is no real way of estimating what that proportion would be. Therefore, it would be careless to make any estimation at this point.

## Merchandise

Merchandise is one of the most profitable elements for touring musicians in the pop and rock genres (Forde, 2017). Historically, the band t-shirt was the main item sold, but the line has expanded to include hats, scarves, jackets and now physical copies of music, including CD and vinyl. With access to digital retailers, bands and artists can now sell their items all year round.

The calculation of merchandise sales includes items sold nationally and further afield as that revenue returns to the Scottish economy. Merchandise sales were calculated using data from AtVenue (2019). An end-of-year report indicated that the average spend per attendee at a live music event in 2018 was £3.50. If that figure is multiplied by the average venue capacity and the number of shows, we can estimate an average income per artist. Some venues deduct up to 25% of sales; however, this is frequently reserved for larger venues (Chalk and Mansfield, 2021). However, 20% will be deducted from merchandise sales as an average across all venues, as it is currently unclear who does and does not charge.

Additionally, only artists who performed over ten gigs annually were included in the merchandise section. However, they would be included if there was evidence on their website, Bandcamp or a similar online retailer that they sold high merchandise levels.



<b>Merchandise sales for Scottish-based artists in 2018</b>			
Average spend per head = £3.50	X average venue capacity	X no. of shows	= Average income per artist

<b>Total revenue from merchandise sales for Scottish music creators globally in 2018</b>	<b>£5,806,780</b>
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## Session Work

Picking up session work is significant for most musicians across genres to top up their income or make a full-time living. Scotland has no shortage of great musicians who tour and record with other artists. Within the commercial sector, Ross McFarlane has provided drums for several top Scottish acts, such as Texas and The Proclaimers, since his band, Stiltskin, disbanded. Ocean Colour Scene has also employed singer Raymond Meade to play bass at their live shows and was recently invited by Gerry Cinnamon on his last tour to do the same. Lewis Capaldi also chose to keep the same local musicians when he evolved to play arena-sized venues. Trad and folk musicians are also part of a bustling scene with sessions work for both performing live and recording (Blanche, 2019, p13-14)

Based on interview data (Interview 5, 2023), it is estimated that around 200 full-time session musicians operate across Scotland, although they are primarily located between Glasgow and Edinburgh. More session players perform to generate extra revenue; however, this research is only interested in those considered full-time. The average wage for a musician in 2018 was estimated to be around £23,000 (UK Music, 2019)

It is estimated that session musicians in Scotland generated around £4,600,000 in 2018.

<b>Income for session musicians in 2018</b>		
200 full-time session musicians	Average yearly salary = £23,000	= Total

<b>Total income for sessions musicians in Scotland in 2018</b>	<b>£4,600,000</b>
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## Public and Private Subsidy of Music Creators

Although this chapter examines the revenue generated from the creation, sale and exploitation of music, it is essential to discuss the additional funding revenue within the music industries. The economic support of music creators is crucial for their continued progress.

### Classical Musicians

The funding of the five National Touring Companies in Scotland comes directly from the Scottish Government. For 2017/18, £22,490,000 was distributed, helping to pay musicians wages, stage productions, and assist with international promotion. The BBC SSO do not fund their musicians from the same source; however, we will include them in this calculation for uniformity (2018).

By analysing their respective websites, The Royal Scottish National Orchestra employs seventy-two musicians, the Scottish Opera employs fifty-two, The Scottish Chamber Orchestra employs thirty musicians, and the Scottish Ballet employs forty-eight musicians. Savage (2018) notes that members of the Birmingham Symphony Orchestra were paid around £30,000 a year in wages, which was also conveyed in an interview with Maxwell (2022) regarding the Scottish NTCs.

<b>Income for classical musicians in 2018</b>			
No. of classical musicians employed by NTCs	= 202	X average yearly salary = £30,000	= Estimation

<b>Total income for classical musicians in Scotland in 2018</b>	<b>£6,060,000</b>
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## Popular Musicians

The PRS Foundation has several funds which are accessible to musicians in Scotland. Two of these were utilised in 2018: The Momentum Fund and The Open Fund (Appendix Seventeen). Help Musicians have a number of funding options available to utilise across all genres. 2018 saw Scottish artists receive support from The Fusion Fund, The Transmission Fund, and The Do It Differently Fund. In total, twenty-four Scottish acts received support via The PRS Foundation and Help Musicians (Appendix Seventeen).

Therefore, total funding for popular musicians in 2018 is estimated to be £118,545.

<b>Total funding for popular musicians in Scotland in 2018</b>	<b>£118,545</b>
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## Additional Income Sources

So far, the identification of income streams for music creators has revolved around making or performing music; however, several additional streams fall outside of those categories. Still associated with music is the practice of music education, with music creators offering their services as teachers to provide private lessons while others actively pursue careers in academia.

An additional method identified within interview data is community music projects (Scott, 2022). These programmes range from children learning musical instruments to prisoners in jail learning to write songs. Often, these are funded by local authorities; however, there have been instances where Creative Scotland has provided direct grants.

Although both methods offer generous revenue streams and are crucial in music delivery, they will not appear in the final estimations as it is incredibly challenging to calculate the income from any education-type activities.

<b>Total Income for Music Creators</b>	
Advances	£100,000
PRS	£44,674,760
PPL	£10,983,500
Live revenue	£11,566,323
Session musicians	£4,600,000
Classical musicians (NTCs)	£6,060,000
Popular music funding	£118,545
Merchandise	£5,806,780
<b>Total</b>	<b>£83,909,908</b>

Considering all the revenue streams directly impacting the music industries in Scotland, it is estimated that music creators generated in the region of £83,909,908 for 2018.

## Live Music

The revenues generated from the live sector support the remainder of the music industries in Scotland. Earnings have grown yearly in the UK, with a 10% increase from 2017 to 2018. UK Music estimates the total UK figure for 2018 to be around £1.1 billion (2019). Several distinctions must be clarified before we proceed with the live music sector. First, only music shows and festivals involved with original music will be considered. Additionally, only live music shows which are ticketed will be included. A discussion of amateur music activities already occurred in the previous chapter.

## Promoters

The sale of tickets to a live music event is a promoter's primary income source. Although most function for profit, several run as charities or not-for-profit. The revenue generated from charity organisations will be included in our estimations as the funds ultimately return to the Scottish music industries. Research has identified seventeen promoters across Scotland who facilitate multiple genres of music (Appendix Three). Several promoters operate exclusively within a specific

venue. Hootanannys in Inverness has its own booker, as does Krakatoa in Dundee. Although their income will be included in the promoter section, it will also be added to the music venue analysis. However, it will not be double-counted in the final estimations.

Appendix Three reveals the music promoters identified for this study. Although Companies House indicated income for several promotion companies, additional data was required for a comparative analysis. Alternatively, a list of active live music venues in Scotland was compiled (Appendix Four). A comprehensive internet search revealed the number of shows hosted for each venue in 2018. Data was collected by examining Facebook pages, gig posters and online gig listings. A ticket price for each venue was identified by randomly choosing five gigs and taking an average price. A notable difficulty was determining what capacities to use for shows. Clearly, these can differ depending on the artist; however, using 80% for each show unless otherwise specified was determined. The method was similar to that of Williamson et al. (2003).

Appendix Three, reveals the method of calculating Scottish promoters' revenue as the number of shows multiplied by the average ticket price and then multiplied by capacity, which is estimated to be, on average, 80%. The total revenue from ticket sales for music promoters is £110,155,465. However, this figure is prior to any event costs. These will be discussed in section 5.3.

<b>Total income for promoters</b>				
No. of shows	X	Average ticket price	X	Average capacity (80% unless sold out)
<b>Total income for ticket sales for promoters of live gigs in Scotland</b>				<b>£110,155,465</b>

## Music Festivals

Desk-based research has identified sixty-seven festivals in Scotland in 2018 (Appendix Five), spanning the length and breadth of the country. Two operated as

free, not-for-profit events, eighteen were funded or run as charities, and the remaining forty-seven were commercial events.

Although five revenue streams are available to music festivals in Scotland (UK Music, 2020), not all apply to this study:

Ticket sales
Food and beverage sales
Merchandise
Venue parking
Camping fees

As with music venues, alcohol and food generate additional income; however, catering companies often outsource this for a fee, which means it falls into a different sector of the economy and will not be included in this study.

Although this section is only interested in the revenues raised by live music festival activities, it is also critical to highlight the costs incurred from staging large-scale events. Although the top-line profit appears impressive, the running costs of these events are substantial. Operating a 10,000-capacity festival could cost anywhere between £60,000 and £100,000 for electricity alone, whilst waste management and removal would be another £30,000 (Jinks, 2016).

In order to calculate the revenue of each event, the capacity and ticket price were required. These were obtained from the festival's website or the Efestivals web page. A Google search revealed whether each event sold out, with sources available in the relevant Appendix. Where events did not sell out, in alignment with music venue estimations, 80% attendance was extrapolated. In some instances, numerous pricing tiers were available. In those instances, an average price was utilised.

Therefore, it has been estimated that music festivals in Scotland generated revenue of around £33,334,555.

Total income for music festivals		
Capacity (80%) unless sold out	X	Average ticket price

<b>Total income for music festivals in Scotland in 2018</b>	<b>£33,334,555</b>
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## Ticketing Agencies

This study has identified three ticketing agencies in Scotland whose revenue derives from selling tickets for concerts and festivals (Appendix Seven). The ticketing agent adds a fee to each ticket sold, generally around 10% of the value (Girgis, 2019). Although the cost fluctuates and can often be as high as 15%, it would be wrong to overestimate as the variation would be in the millions. Gigs in Scotland is operated by DF Concerts, which Live Nation owns. However, it will be included as it is a Scottish company run on behalf of its parent firm.

Total income for ticketing agencies		
10% of total live ticket sales	=	£11,015,546
10% of total festival ticket sales	=	£3,333,455

<b>Total income for ticketing agencies in Scotland in 2018</b>	<b>£14,349,000</b>
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## Music Venues

The income generated from music venues derives from venue hire costs and additional spending within the venue. In total, four revenue streams are identifiable (UK Music, 2021):

Venue hire
Food and beverage sales
Merchandise sales
Venue parking

Venue hire fees are applicable for most venues and paid by the promoter, although some smaller establishments have promoters working in-house, resulting in no rental cost. Additionally, another source of income is merchandise. Although this should solely be income for the artist, several venues demand a percentage of sales. Often, this can be up to 25% per night of total sales. However, this will not feature in the final estimations for this section as estimating merchandise sales for Scottish-based venues alone is too challenging. The decision not to include car parking, alcohol, and food is based on their relation to other sectors of the economy. However, the revenue from alcohol sales is essential for the continued functioning of grassroots venues and deserves to be recognised as a critical source of revenue (Pollock and Honey, 2019).

This thesis follows the typology of live music venues, and their capacities proposed in the UK Live Music Census (Webster et al., 2018). The research has grouped venues based on their capacity, with each given an estimated hire cost. The data (Appendix Four) was disclosed by a promoter’s rep who works in the live sector in Scotland for a prominent promoter (Interview, 3). The interview indicated that several variables should be considered, such as hiring a PA for specific venues or the cost of bringing in health workers; however, these can vary greatly. Therefore, this section will assume that all bands require a PA for venues without one, so the higher rental figure was chosen. For stadium shows, data was scarce; therefore, a flat fee of £100,000 was estimated. It is worth noting that some promoter’s own venues whilst others will likely have agreements to lower the costs for continued use. This has not been factored into the final estimation.

<b>Estimated revenue for venue hire activities in Scotland in 2018</b>	<b>£5,277,200</b>
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## Auxiliary Services

Although not an obvious component of the live music sector, services such as stage construction, security, lights, and PA hire fall under live music’s remit, as Frith (2012) suggested. Without the provision of such services, live events would



not occur in a large-scale manner. Companies House was the primary source of revenue for these enterprises; however, several could not be located. In those circumstances, a comparative analysis of company size helped identify which median to apply. Additional survey data was also advantageous for estimations. Appendix Six shows a list of Scottish-based companies.

Many of the auxiliary companies offer services outside of the music industries. Online analysis has identified which businesses operate primarily with live music rather than the commercial sector. Inclusion in the study was based on the assumption that over 50% of business activities must be related to live music activities. The income for these businesses is often generated from the production of shows in music venues or festivals. Therefore, the figure will be deducted accordingly before the final estimations.

<b>Total income for auxiliary services in Scotland in 2018</b>	<b>£7,546,606</b>
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## Touring Crew

An essential element of the live ecology, highlighted during the pandemic, is the number of crew workers behind the scenes who help to produce live events. These can fall into two categories: local crew hired on a per-show basis to load in equipment at venues and technical staff with expert sound and lighting knowledge. Sometimes, the technical crew are hired to go on tour with a band. Interviews with two prominent touring crew have given insight into the number of workers and the types of wages available. Earnings vary depending on experience, role, and the artist hiring, although generally within around £150 - £450 a day.

Based on the number of Scottish artists who tour, it is estimated that around 100 crew work across several bands in various roles. Additionally, it was revealed that, on average, crew work around 18 days a month away from home (Interview 4, 2023).

If 25% of those working at the top level receive £450 a day for 18 days a month, the total revenue for 2018 would be £2,430,000. If the remaining 75% receive

around £150 a day for 18 days a month, the total revenue for 2018 would be £2,430,000.

In total, it is estimated that Scottish touring crews who work globally, though based in Scotland, generated around £4,860,000 for 2018.

<b>Estimated revenue for touring crew in Scotland in 2018</b>					
18 days per month	X	75 (crew members)	X	£150 (daily rate)	Total: £2,430,000 annually
18 days per month	X	25 (crew members)	X	£450 (daily rate)	Total: £2,430,000 annually

<b>Total income for Scottish-based touring crew working globally in 2018</b>	<b>£4,860,000</b>
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<b>Total income for live music activities in Scotland in 2018</b>	<b>£175,522,826</b>
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## Recorded Music

The revenues from recorded labels, recording studios and distribution services have all decreased due to digitalisation. However, UK Music (2020) notes that record companies experienced a 22% income increase between 2015 and 2018, primarily due to the improved revenues from streaming services. A considerable number of commercial acts work with intermediaries based in London; therefore, the recorded music revenues are far lower than those of the live music sector.

## Record Companies

Within Scotland, there are no record companies of scale. Even if there were, the economic impact of any major labels would not affect the local economy as those revenues would conceivably make their way back to London. However, Scotland

does have independent labels that continue to release culturally vibrant music. The primary source of income for labels stems from the exploitation of recorded music. Although this was at once related to the sale of a product, digitalisation has provided several other options to generate revenue. UK Music (2021), in conjunction with AIM and the BPI, disclosed a list of possible revenue streams utilised by labels:

<b>Possible record company revenue streams</b>
Sales
Physical formats
Online and mobile downloads
Subscriptions
Ad-supported
Public performance and broadcast
Synchronisation
Film/TV/Advertising
Games
Premiums
Digital exploitation of audio/visual content e.g. Youtube channel
Artist related income
Other – including merchandise, live events

The following section will not report individual earnings as it would be almost impossible to estimate without access to royalty statements.

Fifty-six record companies have been identified in Scotland (Appendix Eight) that generate a profit by selling music or exploiting rights. An income estimation was constructed using a thirteen-point median scale, survey data and data from Companies House. Five record companies responded to the survey, with three owners revealing they earned less than £10,000. One earned between £20,000-£39,999, and another generated £80,000-£99,999. Information from Companies House aided in identifying revenue for a selection of the remaining businesses. The final data gaps were estimated by examining the remaining record companies' size, artists and number of releases, then assigning them a median based on a comparative analysis.

<b>Median range</b>	<b>Midpoint</b>	<b>No. of record companies within each median range</b>	<b>Income for each median range</b>
< £10,000	£5000	33	£165,000
£10,000 - £20,000	£15,000	10	£150,000
£20,000 - £39,999	£30,000	3	£90,000
£40,000 - £59,999	£50,000	3	£150,000
£60,000 - £79,999	£70,000	0	£0
£80,000 - £99,999	£90,000	1	£90,000
£100,000 - £149,999	£125,000	0	£0
£150,000 - £199,999	£175,000	2	£350,000

<b>Total income for record companies in Scotland in 2018</b>	<b>£995,000</b>
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## Music Distribution

The digital distribution of music transformed the global music industries. Although digital music has overtaken physical sales, there is still a market to own a tangible product. Therefore, revenue from distribution activities has two elements: those who create physical products and distribute them and those who offer digital music distribution services. Scotland has four companies that offer distribution across various formats. Three companies have data from Companies House (Appendix Nine). The final enterprise does not, so an income estimation was required based on companies of similar size and scale.

Therefore, the income of music distribution businesses in Scotland was around £658,723 in 2018.

<b>Total income for music distribution businesses in Scotland in 2018</b>	<b>£658,723</b>
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## Recording Studios

Desk-based research identified ninety-six recording studios based in Scotland. The revenue for each studio was estimated using a detailed methodology. First, identification of a day rate for each premise either located via the studio's website or from direct contact with the owner via email. Several studios offer their services hourly; in this instance, a day would be classed as seven hours. Previous economic research (UK Music, 2021) revealed that recording businesses operate on average 261 days a year; therefore, the same principle will be applied to this investigation. The income will be adjusted accordingly when a recording facility has more than one usable space on site.

Therefore, it is estimated that recording studios in Scotland generated somewhere in the region of £5,503,447 in 2018.

<b>Income for Scottish-based recording studios in 2018</b>		
Day rate (7 hours)	X	261 (days a year)

<b>Total income for Scottish-based recording studios in 2018</b>	<b>£5,503,447</b>
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<b>Total income for recorded music sector in 2018</b>	<b>£7,157,170</b>
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## Retail

The following section will analyse the construction and sale of musical instruments, followed by the sale of music in retail premises (Appendix Twelve). Physical music is sold in retail premises and online from vendors like Amazon or specialised stores. Scotland has lost several large retailers, such as Tower Records; however, HMV has remained active, albeit with fewer stores. Independent brick-and-mortar record shops declined in numbers after the digitalisation of music, although the vinyl revival has aided with their current health.

## Musical Instruments

Two markets exist to purchase new and second-hand/vintage music equipment. This study will not attempt to estimate the sale of instruments through online websites such as eBay, online dealers, private Facebook groups, or secondary retail stores. Instead, the primary source will be direct from retail premises. These premises sell equipment ranging from guitars, drums and keyboards to classical instruments and accessories, including digital recording tools and DJ equipment.

Desk-based research has disclosed ninety-eight premises that sell musical instruments, recording equipment and sheet music. Several of these offer additional services such as equipment rental or repair workshops; however, their primary purpose is the sale of goods. The largest retailer with three stores in Scotland is the UK chain GuitarGuitar. Data from Companies House indicates the company generated £30,541,829 in 2018. If we split that figure by seven, which is the total number of premises in the UK, we arrive at £4,363,118.43 per unit. If we multiply the unit revenue by the number of premises in Scotland, we arrive at a total income of around £13,089,355.

Additional data was located for several retail premises on Companies House, which helped to develop a median.

A comparative analysis was utilised to fill in the gaps where no data could be found (Appendix Twelve). Additionally, there were no responses to the survey from instrument retailers, which restricted our estimations.

<b>Median range</b>	<b>Midpoint</b>	<b>No. of music instrument sales within each median range</b>	<b>Revenue for each median range</b>
< £50,000	£25,000	34	£850,000
£50,000 - £99,999	£75,000	25	£1,875,000
£100,000 - £149,999	£125,000	10	£1,250,000
£150,000 - £199,999	£175,000	4	£700,000
£200,000 - £249,999	£225,000	1	£225,000
£250,000 - £299,999	£275,000	2	£550,000
£300,000 - £349,999	£325,000	1	£325,000
£350,000 - £399,999	£375,000	0	£0
£400,000 - £449,999	£425,000	0	£0
£449,999 - £500,000	£475,000	1	£475,000

<b>Specific stores</b>	<b>Revenue</b>
Guitar Guitar	£13,000,000
Kenny's Music	£700,000
Merchant City Music	£700,000
Band Supplies Glasgow	£1,000,000
Stringers of Edinburgh	£900,000
Rubadub Records (DJ equipment)	£600,000

<b>Total music instrument retail in Scotland in 2018</b>	<b>£23,150,000</b>
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## Music Instrument Makers

One company of scale is involved in the manufacture of instruments, with the remaining companies operating as solo enterprises. A number of those identified export their products worldwide. Desk-based research has identified thirty-one enterprises representing twenty-one Luthiers, one guitar-stand maker, an accordion maker, five bagpipe makers and a company producing guitar pedals. By analysing Companies House and recognising that an average salary for a luthier is

around £28,000 a year, we have created a median system for calculating the income from 2018.

By using the midpoint of each median with the number of instrument makers and assumed income, we can estimate each category generated the amount of revenue detailed below.

<b>Median range</b>	<b>Midpoint</b>	<b>No. of music instrument makers within each median range</b>	<b>Revenue for each median range</b>
< £20,000	£10,000	1	£10,000
£20,000 - £29,999	£25,000	12	£300,000
£30,000 - £49,999	£40,000	4	£120,000
£50,000 - £79,999	£65,000	2	£130,000
£80,000 - £119,999	£100,000	1	£100,000

<b>Specific music instrument makers</b>	<b>Companies House data</b>
McCallum Bagpipes	£400,000

In total, it is estimated that the total revenue for music instrument makers to be £1,060,000 in 2018.

<b>Total music instrument makers revenue in Scotland in 2018</b>	<b>£1,060,000</b>
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## Record Shops

Desk-based research suggests that fifty record shops operate nationwide, with almost three-quarters of those independent businesses. HMV remains an integral component of the retail landscape in Scotland, although it is safe to assume that they are selling fewer physical products now than in previous years. However, HMV is estimated to have been responsible for 31% of all music products sold in the UK in 2018 (Beech, 2018). Record chain FOPP can no longer be considered



Scottish since its takeover by HMV and subsequent takeover by Sunrise Records. Therefore, the only retail premises eligible for inclusion in this study are all independently operated businesses.

The remaining record stores were examined using data from Companies House with additional survey data (Appendix Fourteen), which allowed the construction of a median. Additionally, Rubadub Records sells music and DJ equipment. It is estimated that they generate around £50,000 a year from music.

Where data was unavailable, a comparative analysis took place (Appendix Fourteen).

<b>Median range</b>	<b>Midpoint</b>	<b>No. of record stores within each median range</b>	<b>Revenue for each median range</b>
< £20,000	£10,000	3	£30,000
£20,000 - £39,999	£30,000	14	£420,000
£40,000 - £59,999	£50,000	12	£600,000
£60,000 - £79,999	£70,000	2	£140,000
£80,000 - £99,999	£90,000	3	£270,000
£100,000 - £149,999	£125,000	0	£0
£150,000 - £199,999	£175,000	1	£175,000

<b>Specific record store revenue</b>	<b>Companies House data</b>
Assai Records	£465,000

It is estimated that record shops nationwide generated in the region of £2,130,000 from the sale of products.

<b>Total record store revenue in Scotland in 2018</b>	<b>£2,130,000</b>
<b>Total retail of physical music and music instruments in Scotland in 2018</b>	<b>£26,340,000</b>

## Funding (and Development)

The following section will illustrate the funding levels distributed to Scotland's music sector. Cultural funding originates with the SG, which provides funds directly to agencies and via arm's length through CS. Additionally, CS receive supplemental funds from the National Lottery. Although the main task of cultural funding is to boost Scotland's economic, social, and cultural reach, this section will only analyse the economic contributions provided by funders, not the broader impacts. Although there are no discernible commercial music policies in Scotland, funding does appear in the sector as the commercial and public sectors often overlap.

### Scottish Government

The SG (2018) directly funds the five National Performance Companies: Scottish Opera, Royal Scottish National Orchestra, Scottish Chamber Orchestra, Scottish Ballet, and Scotland's National Theatre. Although not all five entities are based solely on music performance, they all have an element of live music and, therefore, will be included.

<b>National Touring Company Funding from Scottish Government in 2018</b>	
Scottish Opera	£8,000,000
Royal Scottish National Orchestra	£3,960,000
Scottish Chamber Orchestra	£1,990,000
Scottish Ballet (music component)	£4,370,000
National Theatre of Scotland (involved in music)	£4,170,000
<b>Total</b>	<b>£22,490,000</b>

The funds issued are used in several ways, such as purchasing goods and hosting events. The SG distributed a total of £22,490,000 between all five agencies, which disbursed over £37 million back into the Scottish economy, with around 70% of the total turnover from all companies utilised to stage performances and educational events for participants and audiences. The income for classical musicians employed within these companies was discussed earlier in this chapter and estimated to be £6,060,000.

Additional funds are distributed to each company for touring purposes independent of their core funding.

<b>Touring Fund for National Touring Companies in Scotland in 2018</b>	
Scottish Opera	£110,000
Royal Scottish National Orchestra	£80,000
Scottish Chamber Orchestra	£16,000
Scottish Ballet (music component)	£100,000
National Theatre of Scotland (involved in music)	£44,000
<b>Total</b>	<b>£350,000</b>

<b>Total fiscal support delivered by Scottish Government in 2018 direct to the National Touring Companies</b>	<b>£22,840,000</b>
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## Local Authorities

Additional financial support is also delivered to all thirty-two local authorities nationwide. The total figure for 2018 was £575 million; however, there are no details of how the budget was split amongst authorities or how much was invested directly in music activities (Scottish Government, 2020).

## Creative Scotland

Creative Scotland distributes funds through three channels: open project funding, regular funding and targeted funding. In 2018, The open project fund received 1177 applications for support, totalling £23.7 million. The fund had £10.6 million available, and therefore, only 493 applicants were successful. Of those chosen, 117 were from the music industries and shared £2.2 million between them. The data provided by CS reveals that 50% of music applicants were successful.

Regular funding entered its second round of distributions in 2018. The fund's objective is to offer stability and allow for future planning. CS chose 121

organisations to receive the three-year grant of £101.6 million (Appendix Fifteen). The distribution of funds varied for each organisation based on their operating costs. Of the 121 businesses chosen, 35 were involved in music directly or as part of a multi-operational platform. Data from CS revealed that in 2018, the regular funding network distributed £10,322,667 to music-related activities.

Targeted funding supported nine music organisations in 2018 (Appendix Sixteen). Principally, the fund's purpose was the growth of young musicians and audience development. A total of £11,481,000 was disbursed to the nine chosen agencies. The Youth Music Initiative received support from this funding channel, with £8,750,000 allocated to multiple projects and local authorities.

<b>Creative Scotland funding for music-related activities in Scotland in 2018</b>	
Open Project Funding	£2,200,000
Regular Funding	£10,322,667
Targeted Funding	£11,481,000
<b>Total</b>	<b>£24,003,667</b>

## The PRS Foundation

The PRS Foundation helps to develop and support popular musicians as they begin their careers. Having distributed over £37 million to 7300 applications since 2000, the PRS Foundation continues to be the principal funder of popular music in the UK, with £3 million delivered annually. 2018 saw Scottish artists receive funding from four channels: The Momentum Music Fund, The Open Fund, Beyond Borders and The Talent Development Partnership.

The Momentum Music Fund offers applicants grants of between £5,000 and £15,000. Accordingly, a midpoint of £10,000 will be applied. Of the 30 successful applicants in 2018, four were Scottish: Catholic Action, Still Hound, Vukovi and Free Love. Therefore, it can be estimated that applicants received around £40,000 between them.

<b>Momentum Fund</b>			
<b>Median range</b>	<b>Midpoint</b>	<b>No. of popular musicians within the median range</b>	<b>Revenue for each median range</b>
£5,000 - £15,000	£10,000	4	£40,000

The Open Funding from PRS is available to both individuals and organisations. Individuals can receive up to £5,000, and organisations can receive up to £10,000. A midpoint will be applied to estimate each amount. Four individuals from Scotland received funding, suggesting the estimated total was £10,000. Five organisations from Scotland received support, resulting in a total distribution of £25,000.

<b>The Open Fund</b>				
	<b>Median range</b>	<b>Midpoint</b>	<b>No. of popular musicians within the median range</b>	<b>Revenue for each median range</b>
<b>Individuals</b>	< £5,000	£2,500	4	£10,000
<b>Organisations</b>	< £10,000	£5,000	5	£25,000
<b>Total</b>				<b>£35,000</b>

The Beyond Borders fund is in place to support collaborations between artists from different countries, whether touring or artistic creation. Only one organisation in Scotland was chosen in 2018 to receive support. The East Neuk Festival, based in Fife, requested funds to bring a specific artist to perform at their event. The grant can be any amount up to £15,000. Therefore, we will take a midpoint of £7500.

<b>The Beyond Borders Fund</b>			
<b>Median range</b>	<b>Midpoint</b>	<b>No. of popular musicians within the median range</b>	<b>Revenue for each median range</b>
< £15,000	£7,500	1	£7,500

Three organisations were involved in the Talent Development Partnership, a year-long funding opportunity. Drake Music, Sneaky Pete’s and The Scottish Music Centre received support; however, there is no record of the figures delivered to each recipient.

Funding information is available from the PRS Foundation website.

It is estimated that the total PRS Foundation Funding for 2018 was - £82,500.

<b>Total PRS funding in 2018 in Scotland</b>	<b>£82,500</b>
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## Help Musicians

Help Musicians offered fiscal support via three funds. The Fusion Fund aims to help musicians develop and launch new projects. The Transmission Fund is in place to develop professionally as an artist, whilst the Do It Differently Fund assists musicians looking to approach their music-making from a DIY perspective.

The Fusion Fund offers grants between £2000 and £5000; therefore, we will use a median of £3500. Six Scottish artists received the grant in 2018, resulting in the distribution of £21,000.

<b>The Fusion Fund</b>			
<b>Median range</b>	<b>Midpoint</b>	<b>No. of musicians within the median range</b>	<b>Revenue for each median range</b>
£2,000 - £5,000	£3,500	6	£21,000

The Transmission Fund offers grants between £500 and £1500; therefore, we will use a median of £1000. Seven Scottish artists were chosen as recipients in 2018, resulting in an estimated distribution of £7000.

<b>The Transmission Fund</b>			
<b>Median range</b>	<b>Midpoint</b>	<b>No. of musicians within the median range</b>	<b>Revenue for each median range</b>
£500 - £1,500	£1,000	7	£7,000

The Do It Differently Fund had a sum of £59,000. Twenty-two artists received funding, indicating that, on average, each recipient received £2681. Three recipients were Scottish; therefore, it is estimated they received £8045.

<b>The Do It Differently Fund</b>					
<b>Total fund</b>		<b>Total no. of recipients</b>		<b>Scottish recipients</b>	<b>Total funding</b>
£59,000	÷	22	X	3	£8,045

Funding information is available from the Help Musicians website.

<b>Total Help Musicians funding in 2018 in Scotland</b>	<b>£36,045</b>
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## Other Funding Sources

Outside of the primary funding sources, funders are willing to help the creative arts in Scotland. Several trusts and foundations are in place to nurture and develop musicians, although most of these awards target traditional and classical musicians (Appendix Seventeen). Support for Scottish artists is available from the UK, as evident with The PRS Foundation and other avenues such as The Collard Fellowship and The Tillett Trust.

Although CS, The PRS Foundation and HM reveal the recipients of their awards, many others do not. Therefore, it is impossible to present accurate data.

<b>Funding Agencies</b>	
Scottish Government	£22,840,000
CS	£24,003,667
Additional sources	£118,545

<b>Total fiscal support for music-related activities in 2018 in Scotland</b>	<b>£46,962,212</b>
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## Music Representatives

### Collection Management Agencies

Although based in London, PRS and PPL distribute funds to artists and rightsholders around the UK. Both agencies allocate funds quarterly via record companies, publishers or directly to music creators. The methodology was presented in the music creators section; therefore, we will present the final estimation only.

<b>Revenue from Collection Management Agencies Delivered to Scotland in 2018</b>	
PPL	£10,983,500
PRS	£44,674,760

Therefore, it is estimated that total distributions to Scottish music creators in 2018 by CMA are estimated to be around £55,658,260.

<b>Total revenues delivered to Scottish-based music creators by CMAs in 2018</b>	<b>£55,658,260</b>
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## Publishing Companies

Although the publishing sector remains one of the critical economic sectors in the UK music industries (UK Music, 2019), Scotland has no companies of scale. 23rd Precinct Music is currently the most commercially successful enterprise, with several Scottish songwriters and a significant back catalogue of material. The remaining publishers represent folk and traditional music. Income for music publishers stems from several sources. UK Music, in conjunction with the Music Publishers Association, identified multiple sources of revenue (2019b, p21):

<b>Payments from collection societies</b>
Broadcast (radio, TV)
Online (downloads, streaming)
International
Public performance (shops and businesses)
Live
Recorded media (CDs, vinyl)

<b>Direct licensing</b>
Online (downloads, streaming)
Synchronisation licensing (for use of musical work in visual media)
Grand rights licensing (for use of musical work in a dramatic performance)
Print licensing and permissions
Production music (the licensing of library music direct to music users)

<b>Other receipts</b>
Affiliates
Sub-publishers
Print hire (hire of scores and parts for performance)
Printed music sales

Collection agencies such as PPL and PRS for music provide revenue from streaming, online content, physical media and licences for music playing in shops and bars. Direct licensing from the publishers also occurs with synchronisation licensing, streaming services and grand rights licencing. The final revenue stream, pertinent within Scotland, is the sale of sheet music. Several publishers identified for this research specialise in sheet music relating to classical, choral, folk and traditional compositions.

A mixture of survey data and records from Companies House have aided in calculating the revenue generated by the publishing sector. As with record companies, achieving a full breakdown of revenues regarding each revenue stream would only be possible with access to a royalty statement; therefore, only an estimated income figure has been provided.

It is estimated that the total revenue generated by publishers in Scotland for 2018 is in the region of £100,000.

<b>Total revenues generated by publishers in Scotland in 2018</b>	<b>£100,000</b>
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## Managers

The role of a music manager has significantly transformed over the last twenty years. The introduction of digital technologies has altered the income streams available to them and their artists. The MMF (2019) has noted that although revenue streams have diversified, music managers remain on commission-based earnings of around 20%. There are newer business models, such as joint ventures between managers and artists, where remuneration varies across revenue streams; however, this business model is still in the early stages of experimentation.

A combination of survey data and files obtained from Companies House helped identify revenue for several managers. Typically, 20% of the total income generated from specific artists was utilised as a benchmark for managers where no data was available.

<b>Median range</b>	<b>Midpoint</b>	<b>No. of music managers within each median range</b>	<b>Revenue for each median range</b>
< £10,000	£5,000	6	£30,000
£10,000 - £19,999	£15,000	3	£45,000
£20,000 - £39,999	£30,000	3	£90,000
£40,000 - £59,999	£50,000	5	£250,000
£60,000 - £79,999	£70,000	1	£70,000
£80,000 - £99,999	£90,000	3	£270,000
£100,000 - £149,999	£125,000	1	£125,000
£150,000 - £199,999	£175,000	0	£0
> £200,000	£200,000	1	£200,000

<b>Total revenues for Scottish-based music managers in 2018</b>	<b>£1,080,000</b>
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## Live Music Agents

Live music agents receive a percentage of revenues generated from the sale of concert and festival tickets. The industry standard is 10%, although this is negotiable and dependent on the artist. Only three commercial agents operate across Scotland, with some offering additional services. Colin Keenan manages ATC Live, whose headquarters are in London; however, it is unclear how the revenue structure operates concerning Scottish revenues remaining in Scotland. The remaining two agents are Scottish businesses. The estimated income is derived from the revenues of music creators. One survey response has been added as it could not be any other agent.

The total income for live music agents in Scotland is estimated to be around £272,500.

<b>Total revenue for live music agents in Scotland in 2018</b>	<b>£272,500</b>
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## Summary

The total revenue generated from music representatives is estimated to be around £57,110,760.

<b>Total revenue generated for music representatives based in Scotland in 2018</b>	<b>£57,110,760</b>
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## Scottish Music Industries Total Income/Funding Summary

Music creators	£83,909,9089
Live music	£175,522,826
Recorded music	£7,157,170
Music representatives	£57,110,760
Retail	£26,340,000
Funding of music activities	£46,962,212

## Accounting for Double-Counting

Thus far, an analysis of each sector recognised for the industry map has provided the data required to quantify their economic worth. However, combining the individual sectors and claiming to obtain an absolute figure would be inaccurate as an analysis of double counting is required. For this research, double counting will be defined as counting the same revenue over several sectors. An example is a music creator who receives payment for a live music performance from a promoter. The study will include that income in the music creator's section as that is their total revenue; however, it must be deducted from the promoter's total revenue. Otherwise, it will be included twice across sectors, thus conflating the worth of the overall music sector.

The difficulty of double-counting spawns numerous music reports and mapping studies (Williamson, Cloonan and Frith, 2003; Page and Carey, 2008; UK Music, 2020b). Although there is no single method to combat the issue, a combination of literature, interview data, and personal experience will aid in estimating the overall worth of the music industries. Several studies out with the arts and humanities have investigated the issue of double-counting and highlighted several methods to address the problem, which, although noted earlier, are worth emphasising again. Three core issues are stressed when tackling double-counting: defining the role of each music industry sector to avoid ambiguity between roles, defining each revenue stream clearly, and increasing knowledge of the industry and the intricacies of its value-generating abilities across sectors (Fu et al., 2010). Whilst the previous chapter aided in defining the key sectors of the music industries, this chapter has so far identified the revenue streams available. The remainder of this section will address where double counting occurs.

## Music Creators

The revenue generated from music creators predominantly remains with them. However, several acts identified for this study have management, who will collect, on average, 20% of their total revenue. Therefore, a deduction of 20% will occur with any music creators recognised as having representation.

Booking agents receive 10% of the overall revenues from the live activities of music creators; therefore, the total will be deducted from the music creators section.

National touring companies often hire classical and chamber musicians full-time. The salaries are generated from funding provided by the Scottish Government. Therefore, we will deduct the total salaries from the funding and development section.

Total Deductions	£1,372,500
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## Live Music Promoter

The Live sector has several areas where analysis is required to eliminate double counting. Music promoters are central to the economic returns for music creators. However, their revenue via ticket sales has a broader reach than those performing, as Forde (2017) emphasises. The total revenue has several deductions before the artist receives their fee (Interview 1). Assuming costs are around 30% and the remaining revenue is split 85/15 in the music creator's favour (Forde, 2017), the final figure is estimated to be £11,566,323.

## Music Festivals

Although the gross revenue of a music festival appears impressive, profit margins are far lower once costs are deducted. It is estimated that for a 10,000-capacity festival, the promoter would receive around 15% of the gross (Girgis, 2019). The remaining 85% will cover the cost of booking the artists (25%), hiring the venue and facilities (20%), Marketing (5%), and hiring staff, production and ensuring site safety (35%).

## Funding and Development

Whilst the total funding across all sectors was £46,962,212 for 2018, some deductions are required to avoid double counting.

First, the wages of the NTC musicians from the music creator section and the funding for commercial activity from PRS for Music and Help Musicians will be deducted from the total in the funding section as they will be counted in music creators.

Two music festivals received regular funding from Creative Scotland for 2018: Celtic Connections, which received £183,333 and The St Magnus International Festival, which received £166,667. Therefore, we will deduct both figures from the music festival estimate when calculating our total revenue.

The amount of financial support injected into the music industries in Scotland after deductions is estimated to be £40,433,667.

## Summary of Total Income and Revenues Generated across the Music Sector

The following section will reveal the final economic estimations of the music sector in Scotland for 2018. The previous section highlighted the need to analyse and investigate where double counting occurs. All efforts have been made to be transparent and consistent with the methodological choices for each sector. The methods employed for this chapter cannot be compared with other studies as it is a compilation of several approaches.

<b>Total profit/funding for each music industry sector in Scotland in 2018</b>	
Music creators' total profit	£82,537,408
Live music total profit	£37,311,297
Recorded music total profit	£7,157,170
Music representatives' total revenue	£1,342,500
Retail total revenue	£26,340,000
Funding of music activities	£40,433,667

Therefore, this research estimates that the total revenue and funding generated for the music industries in Scotland for 2018 was £195,122,042.

<b>Total monies and funding generated by the Scottish music industries in 2018</b>	<b>£195,122,042</b>
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## The Multiplier Effect and its Impact on Music Tourism

So far, the direct impacts of live music and the revenues generated indicate what the sector is worth to the music industries; however, it is vital to investigate the broader impacts. The research has identified the direct impacts, such as music creators and specialised crews. However, the indirect impacts of music tourists are

a crucial element of the live music ecology. A description of the indirect impacts will reveal the economic importance of live music to the music industries and the broader Scottish economy.

Music tourism remains an essential tool for value creation to the economy of Scotland, with around 1.1 million people travelling to see a concert or festival in 2018. Analysing an event such as the Trnsmt festival in Glasgow, it is evident that many of those attending reside in the surrounding areas and further afield. Those who buy tickets will inject cash directly into the local economy via concert tickets, merchandise, food and alcohol. The indirect effects are identifiable in areas such as hotels, bars, restaurants, retail and transport, which all support the event (UKMusic, 2019).

Initially, the plan for this section was to work with UK Music and utilise their bespoke methodology for estimating the economic income generated by music tourism in Scotland; however, Covid-19 prevented any collaboration. Instead, I consulted with Trevor Buck from the UofG Business School on potential methods which could be utilised. It became apparent during discussions that generating a reliable multiplier was, as Trevor revealed, “a thesis in itself”. Rather than abandoning the idea, several other multipliers were sourced from relevant literature on the creative industries and live events.

Before proceeding, it is crucial to reveal that although multipliers are utilised widely by governments and arts organisations, they are not the gold standard of evidence. The first instance of the multiplier being used with regard to culture was by Myerscough in his paper, *The Economic Importance of the Arts in Britain* (1988). Whilst this was influential, claims were made regarding what some believed to be a flawed methodology (Hansen, 1995). The use of economic impact statements continued regardless of the criticism, with former culture minister, Chris Smith, openly admitting to strategically utilising data to build his case for government funding with careful wording while he was the culture minister (Smith, 2003). More recently, the Bazalgette Report (2017) reiterated Smith’s comments on producing a convincing case for the creative industries based on illustrating a prosperous sector that could boost the national economy. Whilst multipliers are an important way to bring attention to specific sectors, it is also crucial to remember that they are not based on tangible



evidence. As Belfiore (2022) has argued, multipliers are often presented without any methodology and, therefore, cannot be tested for reliability or dissected. Finally, whilst it has been noted elsewhere in this thesis, it is again important to reiterate that the economics of the arts are not the only indicator of value.

The scope and coverage of this project make it almost impossible to generate data estimating the economic reach of live music events. However, research from the Centre for Economics and Business Research (CEBR) on behalf of the Arts Council England provides a methodology transferable to this thesis. The CEBR multiplier was chosen as the organisation is a market leader in economic impact statements and policy research. Additionally, similar research from Wales estimating their economic impact for the music sector in 2019 utilised the same multiplier with successful results (Todd et al., 2022). The authors of that paper are well-respected academics; therefore, it was logical to use the CEBR methodology.

CEBR (2020) estimated the direct, indirect and induced impacts of the arts and culture sector on the economy and estimated that for every £1 spent, the broader impact would be £2.24 based on gross domestic output. The method utilises revenues before any costs are extracted. Therefore, an estimate can be derived if we add the total income from live events and merchandise spending and multiply it by £2.24. By applying the multiplier above, it is estimated that the total spending related to music tourism in Scotland for 2018 was £406,178,317

<b>Total spend related to music tourism in Scotland in 2018</b>	<b>£406,178,317</b>
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## Conclusion

By utilising the mapping model introduced in chapter four, this chapter has endeavoured to estimate the economic worth of the music industries in Scotland based on the revenue of five sectors and the cultural funding provided by the SG, CS and other music funders. Each section has offered a bespoke method of calculating the estimated revenue.

Double counting has remained the most challenging element of the chapter. My own experience working in the Scottish music industries and a review of the

literature from chapter two revealed several ways to combat this, which were implemented. The investigation revealed that the total revenue and funding generated by the Scottish music industries for the Scottish economy in 2018 was £195,122,042.

The final section has estimated the impact of music tourism on the Scottish economy through direct, indirect and induced spending. Utilising a multiplier from the Centre for Economics and Business Research (CEBR, 2020), it is gauged that in 2018, live music activities generated around £406,178,317 for the Scottish economy.

Whilst the estimates presented in this chapter may not be 100% accurate, they remain valuable. Several economic variables cannot be accounted for in a research project of this scale. Therefore, in most cases, it was reasonable to apply a one-size-fits-all methodology and tailor it to the most applicable economic estimations for each sector under analysis.

## Chapter Six: An Examination of Value-Creation Within the Scottish Music Industries

“The function of music is to enhance in some way the quality of individual experience and human relationships; its structures are reflections of patterns of human relations, and the value of a piece of music as music is inseparable from its value as an expression of human experience” (Blacking, 1969 p34)

Value is an inherently problematic concept to address, particularly regarding music. Until the mid-1800s, music was valued mainly for its ability to provoke emotion; however, as the sale of sheet music increased, it soon became big business. As the creative industries have shown, it is now also valued for its revenue-generating abilities.

The following chapter will introduce empirical evidence, arguing that music should be valued for its exchange and use value, as revenues are only one piece of a larger narrative. Whilst chapter five identified the revenue streams and economic worth of the music industries in Scotland, this chapter will investigate two separate topics: the additional values generated by music activities over and above the economic and the value creation processes in the new digital music economy. Chapter five was essential in fulfilling the request of the partner organisation to deliver an economic estimation of the Scottish music industries; however, a financial value placed on music, whether physical, intangible or experiential, is not the only indicator of value. As the literature review indicated, social and cultural values (Klamer, 2003) are inherent in musical texts and performances, which are equally weighted in relevance.

Therefore, this chapter will investigate the value of music as a cultural good from several perspectives. The first section will investigate the value of music from a political standpoint, exploring the intrinsic and instrumental divide. The second section will examine the work of cultural intermediaries, demonstrating that the music sector is a complex web of tangible and intangible transactions based on economic, social, cultural and symbolic capital, which various intermediaries acquire and exchange for others. The final section will investigate value creation

within the Scottish music industries, illustrating that the process has developed from a goods-dominant Logic to a service-dominant Logic (Lusch and Vargo, 2004). In this sense, value is co-created among numerous intermediaries across the sector with tangible and intangible transactions.

## Beyond Economic Analysis

“Music matters because it has the potential to enrich people’s lives, and enrich societies ... [It both] feels intensely and emotionally linked to the private self ... [and] is often the basis of collective, public experiences” (Hesmondhalgh, 2013, p1–2).

The Creative Industries are the fastest growing sector in the UK, five times faster than the national economy, contributing £115.9 billion to the United Kingdom with a 43.6% increase from 2010 to 2019 (Waitzman, 2021). According to UK Music (2020), around £5.8 billion came from music-related activities. These estimations of economic worth are essential to highlight the success of the creative industries and, more specifically, the global music industries. However, the following section will illustrate that providing an economic valuation of the music industries in Scotland alone is reductive as it negates the intrinsic benefits.

Although the partner organisation for this thesis requested an economic valuation, I am cognisant that music is valuable beyond the revenues it generates. It has been noted elsewhere that economic valuations of culture do not capture the multifaceted nature of cultural value, “particularly the social aspects” (O’Brien, 2010, p19). The SMIA hopes to use Chapter Five’s findings to lobby the Scottish government for fiscal support to develop and grow commercial music activities in Scotland; however, offering a more holistic valuation could strengthen the SMIA’s argument.

Valuation becomes more challenging when analysed from a political perspective as there is a shift in language and “a tension between the way public policy understands value and the way value is understood and created by the arts and humanities” (O’Brien, 2015, p79). In alignment with the UK Government, the Scottish Government funds public culture based on the perceived impacts induced

by cultural participation. These instrumental outcomes are delivered via economic impact statements emphasising revenues and job opportunities while promoting social outcomes. Although measuring impacts is critical for accountability, the lack of intrinsic attention suggests two possibilities. Either the government do not regard personal experience as a reputable indicator, or providing individual accounts is too challenging.

It has been argued elsewhere (Walmsley, 2013) that successive UK governments have altered the perception of the arts to a stage where they have become industrialised with their social and intrinsic impacts hidden, resulting in the use of revenue as a proxy for value. Bille et al. correctly assert that “a focus on the potential economic impact of culture can create a misguided cultural policy” (2014, p240). The dominance of instrumentalism and the use of impact to evaluate the worth of cultural policy is useful when investigating policy decision-making; however, it negates the primary motivation of why individuals interact with the arts. Although policy determinations are rooted in econocratic ideas, the commercial and public sectors struggle to define culture’s value, which is likely why they often rely on economic valuations. However, if individual benefits are the real value of interacting with the arts, “policy-makers need a stronger understanding of how intrinsic benefits translate into instrumental outcomes” (Brown and Novak-Leonard, 2013, p231).

## The Changing Nature of Cultural Value

The Cultural Value Project (CVP) was a two-year research project commissioned by the AHRC to investigate the value of arts and culture across seventy pieces of research. The project aimed “to put the experience of individuals back at the heart of ideas about cultural value, arguing that it is only once we have started with individual experience that we can then work outwards, and understand the kinds of benefit that culture may have for society, for communities, for democracy, for public health and well-being, for urban life and regional growth” (Crossick and Kaszynska, 2016, p5). Whilst instrumental analysis has investigated the economic and social impact of live music activities, the project employed a qualitative approach to enhance the understanding of the arts regarding their intrinsic value.

Whilst cultural value is often linked to policy decisions, the CVP broadened the scope to incorporate commercial, public and third-sector culture.

Research conducted for the CVP demonstrates that there are intrinsic benefits to attending live music events that are identifiable and measurable. The study indicated that although economic estimations of activity are essential for providing an argument as to the value of music, providing a qualitative assessment, in addition to economic figures, would deliver a nuanced account highlighting specific areas that may require more direct support from funding (Behr et al., 2014). A follow-up report was more explanatory of their findings (Behr et al., 2016, p414):

- Those attending live music events are doing so with the hope of experiencing something “transcendent”.
- Those attending music events often do so for various reasons; therefore, collecting various accounts of those attending is necessary.
- Most importantly, “the instrumental value of live music may be easier to measure than its intrinsic value, but instrumental value always derives from intrinsic value and is not a measure of it.

Therefore, a cultural event has two strands of value: the revenue the event yields and the positive personal experience that individuals experience by attending. In this sense, the CVP supports Bruenger’s argument that it is not music that drives a music sector; instead, it is the “music experience” (Bruenger, 2019, p87).

## Music as an Instrument of Change

Westminster and the SG have used the arts to meet government goals via economic and social targets. The positive impacts of music-making or attending live music performances are crucial because they can positively affect an individual’s health and well-being. The contribution of arts and culture to society has been widely reported in the literature (Matarasso, 1997; McCarthy et al., 2004; Belfiore and Bennett, 2008; Mowlah et al., 2014; Carnwath & Brown, 2014). Current research from UK Music reveals that 74% of adults confirmed that music is meaningful to their quality of life (Meadows and McLennan, 2022). However, it is

a mistake to assume that music is a universal good. Whilst those taking part in music activities would often describe the benefits, there are occasions where others do not. Noise complaints from neighbours or individuals living close to live music venues could be seen as a nuisance, which is why, according to Frith (2013), it is wrong to assume that music is always a public good.

## Everyday Music

Community music practice covers a broad spectrum of activity, although Higgins suggests it can be defined as “an active intervention between a music leader or facilitator and participants” (2012, p3). Through these interventions, many of the social benefits of music arise, particularly with vulnerable or disenfranchised groups. In this sense, they are offering a type of cultural democracy (ibid, p7). The MusiCares initiative, run by the SMC, is the first national music project primarily for those within Scotland’s care system. Managing Director Gill Maxwell explained that “MusiCares has completely exploded. We can’t handle MusiCares for care experienced young people because it’s doing so well in its third year that all the schools and educational facilities who specialise with that group of people, they’re referring in big numbers” (Maxwell, 2022). The surge of interest indicates a demand for similar services and is vital for children who do not have direct access to music making.

Learning a musical instrument and interacting with music can positively impact a child’s development from an early age due to the cognitive benefits, collaborating skills and learning to communicate with others. Additionally, learning to play music with others provides an opportunity to interact with other cultures whilst improving social mobility. Whether this occurs in a youth orchestra or as part of a band, these tools can be utilised for life (Broad et al., 2019). Children can express and explore their feelings by making music, leading to better mental health and lower anxiety levels. Understandably, access to live music is often difficult for those under the age of eighteen with little data on the topic; however, one music project in Stirling (Pump up the Jams) targets young, working-class children in their teens has shown promising outcomes. Project leader David Scott (2021) explained that although the workshop revolved around music, it indirectly helped literacy skills

and communication and socialisation techniques. In this sense, the social benefits were further reaching than the intended outcomes.

A new thread of research has revealed the impact that music interventions can have in social care settings through music therapy. Music has been shown to have a positive impact on mood, depression, and anxiety in both children and adults. Improvements were identified with individuals singing, playing an instrument or listening to music. Additionally, music intervention has improved the quality of life for those living with dementia through group singing. (Meadows and McLennan, 2022). The Glasgow-based charity Playlist for Life promotes specialised playlists based on dementia patients' musical tastes and history with music. By doing so, individual moods can improve, and anxiety levels can be lowered. The practical work is supported by empirical research involving recorded music (Holmes, Knights, Dean, Hodkinson, & Hopkins, 2006).

## Negative Impacts of Music

The advantages of interacting with music, whether through the commercial or public sector, should now be evident; however, there are instances where those who make music can encounter negative experiences, which is paradoxical. The very thing that helps mass numbers of listeners can have a crippling effect on the personal lives of music creators. Throughout the history of popular music, there are examples of musicians who have struggled with mental health and addiction issues; however, these have only recently been explored in more depth. As Gross and Musgrave highlight, "Music making is therapeutic, but making a career out of music is destructive" (2016, p12).

In the last decade, the tortured genius narrative has been stripped away to reveal the complicated existence of music creators. Research from Gross and Musgrave (2020) and Jones and Heyman (2021) indicate several complex issues. The two key themes identified are related to the precarity of earnings and working conditions. The research for this thesis has consistently identified revenue for music creators as an enduring area of concern, as income can fluctuate and be non-existent for prolonged periods. The working conditions related to music creators are also a source of concern. Making music and releasing it to the world



will result in feedback; however, social media can be a critical space that can be “overwhelming and exhausting” (Gross and Musgrave, 2016, p19). Touring musicians have identified the industry’s darker side with the abuse of drugs and alcohol, long working hours and the constant highs and lows, all leading to negative mental health impacts. Additionally, a consistent issue across the literature was the breakdown of relationships, which can leave individuals feeling isolated and alone (Britton, 2015; Gross and Musgrave, 2017; Jones and Heyman, 2021).

## Summary

Although economic considerations will almost certainly remain the primary focus for commercial and government analysis, this section has demonstrated the possibility of collating a holistic strategy for valuing music activities through qualitative methods, as revealed by the CVP. Furthermore, empirical evidence has shown the additional benefits of interacting with music across various activities. Whilst these additional values are significant, measuring these remains a methodological issue.

During the pandemic, UK Music (2022) began promoting additional benefits of music at a time when revenues were falling by illustrating that “music brings huge benefits to our country – not just for our economy, but for our sense of identity, for our soft power, for our local communities, and for our collective health and well-being” (2022, p6). This suggests that there is an argument to be made for music’s value without continually referring to the economic contribution it makes to the economy.

## The Role of Cultural Intermediaries

Throughout this thesis, music creators have received high-value status. Whilst they are crucial for delivering a value proposition in the form of a song or composition, the role of music intermediaries still needs to be defined. The following section will investigate the value proposition concept to illustrate its significance to the broader music industries and illustrate how it is utilised by cultural intermediaries to aid with value creation. In a simplified form, there are two

stages to the value-creating process: someone who makes music and an end user who consumes it. Bruenger argues that “it is impossible not to see that the end point of all music production processes is the moment when—regardless of medium or venue—the listener experiences the music” (2019, p87).

Value creation is only possible with a value proposition in the form of a song or composition, as otherwise, there would be no new goods, services or experiences. According to Lepak, “Individuals create value by developing novel and appropriate tasks, services, jobs, products, processes, or other contributions perceived to be of value by a target user” (2007, p183). For the musical text to become valuable, it must become commodified, which is the beginning of the value-adding process.

Traditional labour process literature identifies value as primarily concerned with exchange value; however, the production of cultural goods in the digital age has altered this perception. In addition to exchange value, musical texts contain a use value. The use value of a text will attract consumers, although the use value of any piece of music is ultimately subjective (Bowman and Ambrosini, 2000). The use value of a text is essential for securing support from intermediaries who will work with the text to generate additional value properties within the Scottish music industries. The value proposition becomes an “alignment mechanism” (Frow and Payne, 2011, p236), connecting music creators with intermediaries.

Creating a cultural text is not sufficient for it to be valuable. Instead, as Jones (2003) acknowledges, it requires intermediaries with industry experience to add additional value. However, Jones’s speculation that “acts cannot be successful on their own” (p155) without the aid of intermediaries has proven somewhat incorrect by examining the trajectory of Scottish artist Gerry Cinnamon.

The work of intermediaries is crucial in supporting music creators in bringing their texts to the broader public for consumption, as music creators often do not have the skillset or knowledge to successfully “break” themselves into the market. Negus argued that “cultural intermediaries shape both use values and exchange values, and seek to manage how these values are connected with people’s lives through the various techniques of persuasion and marketing and through the construction of markets” (Negus, 2002, p504). Although new media technologies have allowed music creators to bypass many traditional industry conventions, such

as recording music, distribution and promotion, intermediaries remain highly relevant and valuable agents. (Hracs, 2013).

Negus proposed that the role of intermediaries was to add value to the cultural goods between production and consumption. Although he argued this point regarding the recording sector (1996), it can be applied more broadly to any intermediary adding value to the musical text, whether it is delivered as a product or an experience. In this sense, intermediaries can aid in circulating texts, provide meaning, and offer legitimisation practices (Powers, 2015). Legitimisation methods are essential as cultural intermediaries can influence consumption habits. They are extremely valuable in the Scottish sector as “they take local talent to a wider commercial market” (Leadbetter and Oakley, 1999, p45).

A working definition of intermediaries is required as they offer services at multiple activity points for music creators. A cultural value chain from De Propris (2019, p45) provides a framework to group their activities. By applying this to the Scottish context, we can broadly categorise intermediaries into three groupings:

- Creative Intermediation - Funding and Development, Managers, Recording Studios, Producers, Instrument Makers, Instrument Sales
- Commodifying Intermediation - Funding, Live Music (All), Record Labels, Publishers, Booking Agents, CMA, Recording Studios, Distributors.
- Outreach Intermediation - Media, Music Representatives, Record Shops.

Although these are broad definitions, there are several instances where intermediaries will operate across groups.

The traditional notion of intermediaries describes them as professionals in their respective sectors and genres; however, with the rise of the cultural omnivore (Peterson and Kern, 1996), many have diversified their workload, which has been possible due to the overall democratisation of tastes on behalf of both music creators and consumers. The trend was identified amongst a number of those interviewed, with one festival director explaining that she worked within the jazz sector but also carried out promotion work within popular music (Rodgers, 2022). Music managers who would often work within specific genres are now expanding their roster of artists, with one manager representing a DJ alongside a commercial

pop act (Scougall, 2021). Although these decisions could be based on building additional revenue streams, both interviews revealed their broad tastes in music, which accounts for the fluency with which they can move between genres.

The work of cultural intermediaries can influence the choices made by other intermediaries. Maguire and Matthews believe that cultural intermediaries can:

“Construct value, by framing how others – end consumers, as well as other market actors including other cultural intermediaries – engage with goods, affecting and effecting others’ orientations towards those goods as legitimate – with ‘goods’ understood to include material products as well as services, ideas and behaviours” (2012, p552).

Cultural intermediaries are facilitators who provide opportunities for music creators to bring their products to market. The objective of discussing cultural intermediaries in this thesis is to investigate their role in the value-creating process for music creators and themselves.

## Investigating Resource Integration

Now that the role of cultural intermediaries has been established, the following section will illustrate the dynamic transactions that occur during the integration of resources. Access to music has been a fundamental challenge since music’s inception as an industry; however, technology has played a significant role in negotiating the space between creators and consumers (Bruenger, 2019). Although this thesis places the value proposition as the singular most important element of value creation, the value-added sequence of events that occurs afterwards remains integral. Frow and Payne explain that “value develops and emerges over time, rather than being a discrete event” (2011, p.226), which indicates that interaction with intermediaries can make the original proposition more valuable. The process is known as “resource integration” (Kleinaltenkamp et al., 2012, p202). Therefore, value is co-created amongst members of the music sector rather than in a discrete event, such as composing a piece of music.

Although economic value is critical to any business sector, intermediaries also obtain and exchange more subtle value types. By applying Bourdieu's theory of capital (1986), an analysis of economic, social, cultural and symbolic capital will demonstrate the types of transactions occurring across various sectors. Although capital is understood as revenue, this thesis will apply a broader definition incorporating monetary and non-monetary forms. In this sense, it will follow Allee's notion of a value network (2000), which asserts that intermediaries interact across sectors to create and trade diverse value types.

Exchanges among intermediaries and music creators are often dynamic and only sometimes grounded in economic reasoning, as there are more assets than revenue alone. In some instances, intermediaries may be more content with attaining dominant positions in their sectors and accruing additional capital (social, cultural or symbolic). Although Bourdieu delineated four types, he gives primacy to only one, believing that intermediaries strive to transform social, cultural and symbolic capital into economic capital.

“So it has to be posited simultaneously that economic capital is at the root of all the other types of capital and that these transformed, disguised forms of economic capital, never entirely reducible to that definition, produce their most specific effects only to the extent that they conceal the fact that economic capital is at their root” (Bourdieu, 1986, p288).

However, a study investigating capital conversions by craft entrepreneurs has challenged Bourdieu's logic by revealing that those examined gave no primacy to economic returns (Pret, Shaw and Dodd, 2016). Therefore, the following section will examine the activities of intermediaries operating across the music industries in Scotland and investigate capital conversions between stakeholders. In doing so, it will become clear if economic capital is as critical to those in the sector as Bourdieu believed.

## Typology of Capital

Four types of capital can be exchanged among intermediaries: economic, symbolic, cultural, and social (1986). The following section will investigate each type of capital and illustrate its use within the music sector in Scotland.

Economic capital is an actor's resources, either as cash, assets or property. It is often utilised to accumulate additional capital, such as social or cultural. Regarding the music industries, assets can be considered intellectual property, such as the copyright of songs or branding and image capture, which often have relational rents applied to them.

Symbolic capital is characterised as "accumulated prestige or honour" (Bourdieu, 1991, p14). It is second only to economic capital, legitimising whoever attains it, with Bourdieu describing it as a "veritable credit" (1996, p142) capable of being converted into long-term economic returns. Symbolic capital is recognisable as high levels of record sales or concert ticket sales, winning awards or achieving commercial success. Additionally, the buzz occasionally associated with new up-and-coming musicians can be translated as symbolic capital with the potential for conversion into economic capital (Hesmondhalgh, 2006).

Cultural capital is education, skills or knowledge that provide social mobility tools. Bourdieu specified three cultural forms (1986). Education certificates characterise the institutionalised form. The embodied form is individual personal qualities that are inherent to them. Finally, the objectified form is located in material objects such as a physical recording, an instrument, or a music venue. The accumulation of cultural capital can be a slow process that occurs over time; however, it is a highly revered form to attain.

The importance of social capital lies in the networks of individuals with the skills to either support or help influence others. Individuals can strengthen their position in any employment sector by building networks and accumulating contacts. Social

capital can be accumulated over time and should be regarded as a long-term investment. Joining agencies such as PPL or the PRS are examples of social capital, as is The Scottish Music Industry Association (Anheier et al., 1995).

## The Conversion of Capitals

“(T)he real logic of the functioning of capital is the conversion from one type to another” (Bourdieu, 1986, p250).

Digitalisation has opened up the possibilities for music creators and intermediaries to connect and convert capital more easily by accessing social networks online. Whether self-releasing music or locating intermediaries to work on a project, the internet has democratised power, providing direct access to resources.

In most cases, early career musicians require more economic capital and must, therefore, utilise additional tools at their disposal. The aim is to present themselves as “subjects of value” (Skeggs, 2004, p72) with whom others wish to work. For this to occur, music creators must create cultural goods with a use-value and an exchange value. The distinction between use value and exchange value is essential when analysing cultural goods because, as Skeggs explains, this “enables us to see how different groups have different possibilities for evaluation”, therefore “shifting attention away from the object/asset being exchanged to the relationships and power that make the exchange possible in the first place (ibid, p11). Within this domain, cultural goods are the subject of analysis from intermediaries, and the opportunity for artists to appeal to larger markets is possible. In order to do so, artists must use whatever capital they hold to gain the attention of intermediaries.

Importantly, once capital mobilisation occurs, a use-value is generated. The text also carries an exchange value once music creators have a finished product. Therefore, a creator’s profile can be constructed using social, cultural and symbolic capital as use values, which can then be converted to economic capital based on exchange value. In this sense, the music creator also becomes an object of exchange based on the interest of cultural intermediaries (ibid).

## Symbolic Capital

Symbolic goods such as songs are created with an inherent value attached, although others must recognise that value before it can become legitimate. However, once legitimisation occurs, success is not guaranteed as there is no formula for what the public will enjoy and purchase (Caves, 2000; Schreiber and Rieple, 2018). The acquisition and exchange of symbolic capital is not limited to the music sector alone, with social media and online websites responsible for public recognition and contributing to the success of new and established acts. Artists will attempt to gain low levels of local success before working with intermediaries, which is why obtaining symbolic recognition is critical.

The acquisition of symbolic capital is vital for music creators as it can lead to long-term economic returns. However, it is not easily attained. Instead, it is bestowed by intermediaries and consumers. Once this occurs, an artist will have a level of excitement attached to them, also known as “buzz” (Caves, 2000; Hesmondhalgh, 2006). Once this occurs, the capacity to convert symbolic capital to potential economic capital is highly appropriate for the three core sectors of music activity: recorded music, live music, and music publishing. However, it is also possible to assemble a team of intermediaries who will work to build an artist’s profile, adding value to them as a brand (Scott, 2012). The acquisition of symbolic capital is relevant from an industry perspective when determining which music creators’ intermediaries choose to work with and associate. Additional methods to achieve symbolic capital include high levels of sales, successful touring, winning music-related awards, gaining high charting records, performing at well-known festivals and working with a successful record label (ibid).

Converting symbolic capital to economic capital is possible once legitimisation has occurred. Consequentially, intermediaries across sectors will view an artist as having the potential to generate income from various sources. In this sense, the artist has become valuable and a brand. The conversion of symbolic capital can occur via several channels. Working with a music manager can provide access to the broader music industries and a wealth of industry contacts. Record and publishing companies are interested in acquiring and exploiting the symbolic capital accrued by artists and the cultural goods they produce. By signing a record



deal, the artist can have access to cash reserves to develop and promote themselves with the chance of receiving a cash advance depending on the chosen label.

A music publisher will also use the music creator's intellectual property to generate revenue through relational rents. Access to local and regional touring from music promoters will aid with financial returns and help build an artist's profile, providing further legitimisation. The more symbolic capital accrued, the larger the crowd an artist can draw for live concerts. Additionally, once an artist accrues symbolic capital, this can be converted into social capital by inclusion in previously unavailable networks (ibid).

Music creators are not the only stakeholders able to generate or obtain symbolic capital. Recorded music in Scotland is represented by a number of small independent labels renowned for working with culturally rich artists. Chemikal Underground and Rock Action Records are the largest in Scotland, whilst Olive Grove Records operates as a labour of love. These labels and numerous others attract artists to work with them based on their roster and history. In this sense, record labels can sign acts based on their own symbolic significance and association.

## Social Capital

For those pursuing a career in music, social capital is a crucial component to acquire to maintain and further one's career. The most utilised means of doing so is by building networks of social contacts within the music sector and the broader creative industries, with literature noting their importance (Coulson, 2012; Scott, 2012). The strength of relationships depends on the resources available to members and the willingness to share with others in the network (Granovetter, 1973). Although the music industries are built on interpersonal relationships, these are only possible with a certain degree of cultural capital. In its embodied form, this translates to expertise, using the correct language and appearing to fit into the correct networks due to image (Bourdieu, 1996).

Early career musicians rely on social networks to catch the attention of intermediaries, which is essential for access to larger markets. Media services play a critical role in developing buzz for artists, often built on the strength of networks created by intermediaries. For one publishing company, social capital was vital for obtaining work opportunities. Montgomery (2022) discussed the process of working to briefs for a number of her songwriters. Collaborating and sharing expertise made several high-profile K-pop releases in Japan and Korea possible, resulting in economic capital.

Utilising social media is another way to build relationships. Although not all social media operates in the same manner, it can be broadly described as “a group of internet-based applications” that allow the “creation and exchange of user-generated content” (Kaplan and Haenlein, 2010, p61). Applications such as Twitter, Facebook, Instagram and TikTok allow users to connect with others. The artist-fan relationship can then strengthen through the continual interaction of new content. Furthermore, social media fosters an “economy of favours” (Haynes and Marshall, 2018, p1985) through the utilisation of social capital, which can be generated in the form of photo sessions and gig opportunities from promoters. Additionally, building strong networks with fans will result in the monetisation of an artist as a brand, with cultural texts and as a live act.

Furthermore, social media allows music creators to connect with intermediaries, which may have been more challenging before the internet. Traditionally, joining networks was only possible in person and often based on locality. However, social capital can now be accrued in any location as long as the individual has access to the internet and a device.

The acquisition of social capital is central to functioning as a music manager. The role often permits the building of contacts across multiple networks. The accumulation is often slow to begin with; however, if a stakeholder has previously worked in the music sector, they are already in a fortunate position. As one manager explained, “I had connections with a lot of these artists through friends and through previous work” (Interview 1, 2021). In this sense, social capital is valuable across sectors. Additionally, by working with artists, managers can obtain a degree of cultural capital through mutual association.

## Cultural Capital

Three types of cultural capital are relevant to music creators and the broader Scottish music industries. The embodied form is closely linked to social capital, relating to the way someone speaks, acts or presents the knowledge they have. Some artists will have high levels of embodied capital, which can then be packaged and branded, resulting in the acquisition of economic capital. However, artists may not have the skills to do this themselves and will, therefore, require the assistance of intermediaries with the knowledge and skills.

Although institutionalised cultural capital is primarily beneficial for intermediaries to further their professional careers, it is also relevant for those attending music schools for performance or composition studies. Music creators who acquire such qualifications will already be in social networks of like-minded musicians, where career opportunities will be readily available. Specifically, institutions such as the Royal Conservatoire in Glasgow produce a diverse range of career-ready musicians who can convert their institutional capital into economic capital.

Alternatively, students in Scotland attending higher education institutions offering music industry degrees can also benefit from institutional capital. However, this is converted into social capital by networking and building solid connections across sectors. Over time, this, too, can be converted into economic capital.

Although intermediaries may not understand how to play an instrument or be a musician, they can acquire the power associated with that knowledge, embodied in cultural capital, through direct association or economic capital exchange. This becomes apparent within the creative and cultural industries. Specifically, the music industries, where booking agents, managers or marketers of music and the artists who record that music can acquire cultural capital through association without possessing it. This also applies to individuals who possess a particular machine or device but may not have the actual cultural capital needed to use it appropriately. The ownership of these items, or association through a proxy, also portrays a level of symbolic capital that reinforces the actor's social status or position. However, this only remains effective if it is used as a tool within the field or social space (Bourdieu, 1986). This is evident when a manager or booking

agent who represents a well-known artist wields this power intentionally to his or her personal advantage or on behalf of the artist they represent. Being 'associated' with a commercially successful artist and the symbolic capital represented with that may be used to achieve further symbolic, economic or social capital if so chosen.

## Summary

Capital conversion is a complex activity. Whilst generating revenue is not necessarily the first priority for all music creators, it certainly cannot be disregarded within resource integration. Literature has portrayed cultural intermediaries as "self-interested entrepreneurs seeking to maximise economic value" (Perry, 2015, p724). However, research for this thesis has shown that this is not always the case, with many intermediaries overworked, underpaid and working for job satisfaction. Whilst not addressed directly, many of those interviewed alluded to going over and above their actual roles to help others, sometimes at the expense of their time and without financial return (Calder, 2022; Montgomery, 2022; Rodgers, 2022; Whytock, 2022).

## Does Scotland's Music Industries have a Sustainable Business Model?

"The music industries attempt to make profit out of producing and circulating goods and services based on acts of symbolic creativity" (Hesmondhalgh and Baker, 2011, p57)

Oskam et al. argue that the "way in which actors create and capture value around a value proposition is at the core of the sustainable business model" (2021, p1060). However, this section will suggest that Scotland's music industries are inadequate in several critical areas due to its inability to retain commercial artists' business and intellectual property. Value creation within the music sector has drastically altered with new digital technologies, resulting in a transition to a service-dominant logic, which deviates from the previously goods-dominant logic (Vargo and Lusch, 2004). Technology plays a major role in the value-generating ability of firms, with periods of stability followed by disruption and innovation.

These activity cycles are identifiable with the various listening formats that have transformed over the last hundred years. As technology has improved, so too have the methods of consumption. Value creation within a traditional music sector is possible by analysing “composition, trade of rights, recording, record production, and distribution” (Wirtz, 2020, p161). Previous sections have discussed alternative forms of value created by music from various perspectives; however, the remainder of this section will focus on the economic viability of music.

The music industries in Scotland function by utilising exchange value; however, the end goal of all firms is to create value for the consumer, which derives from use value. Bruenger accurately argued that “regardless of the primary motivation for making music—artistic, social, or commercial—there is always a need for a sustainable economic model for it to survive, let alone thrive” (2019, p108). The literature review noted that the value chain concept appeared outdated; therefore, this section will illustrate the evolution to an ecosystem model (Moore, 1993), an adequate theory for understanding recent changes in many global music markets. Although the global music industries revolve around recorded music, publishing and live music, regional variations occur (Simon, 2019), which is highly evident in Scotland. No publishers of scale operate, and no major record labels have offices.

## Recorded Music and Publishing

“Artists consider recordings less a revenue stream than a publicity tool for touring” (Holt, 2010, p248)

Although the sale of recorded music in physical form has declined, the recorded artefact remains at the heart of the value-creation process as it is the text that other stakeholders in the music industries use to generate revenue from consumers through consumption.

Transforming the value proposition from an intangible idea to a sound recording is essential for creating a good that can be monetised. Often, this takes place in a dedicated recording studio with an engineer or a producer; however, recent advancements in home recording equipment have shortened the gap between amateur and professional recordings. By integrating the value proposition with the

skills of a producer, a master recording can be created which contains both an exchange value and a use value. Although survey results identified recording studios as in high demand, interview data revealed music creators were more split on their recording methods, with two artists using recording studios (Napier, 2021; Scott, 2022) and two preferring to record with mobile setups (Duncan, 2022; Schlesinger, 2022). The decision appears to be based on preference, although Schlesinger alluded to the fact that studio time can be expensive. In the current digital age, it is not the physical recording that is valuable but rather the intellectual property it contains. Research conducted by Hviid et al. into the impact of digitalisation in the UK noted that “Intellectual property rights, and especially copyright, underpins the economic framework used in the music industry” (Hviid et al., 2018, p252). In this sense, selling physical music is no longer the primary driver of revenue.

Music managers are among the most significant intermediaries within the music industries as they supervise their artist’s careers as businesses. As Jones explains, “Artist managers occupy the only position in the Music Industry which interacts with all other areas of activity and the individuals involved with them” (2012, p91). By utilising the master recording, managers develop its utility by interacting with other stakeholders to generate interest domestically and internationally. One of the primary roles of a manager is administrating rights for their artists with a record company and publishing company. Whilst it is possible for musicians to manage themselves, this will inevitably impact their creativity through time, which is why, in most cases, when an artist achieves a specific level of success, a manager becomes vital.

According to Negus, “recording and publishing have been central to how generations of popular musicians have experienced their art, obtained investment and made a living” (Negus, 2019, p375); however, Scotland does not have a strong infrastructure in either of these sectors, particularly publishing. Record labels in Scotland are limited in their value-creating activities as they are all micro-enterprises. Artists who can achieve commercial success continually sign with record labels outside of Scotland. A reasonable deduction is that popular labels such as Chemikal Underground and Rock Action Records do not have sufficient recording or marketing budgets compared to independent or major labels in London. Recorded music in Scotland does generate economic value; however, by

analysing the successful labels and their rosters, assumptions can be drawn regarding their revenue compared to the live sector. The estimated revenues of Scottish signed acts in chapter five demonstrate the disparity (Appendix One).

Olive Grove Records, a well-respected independent label based in Glasgow, operates as a labour of love for owner Lloyd Meredith, who explained, “essentially, we wanted to be a springboard for artists to essentially push who we thought were good and to kind of give them exposure and hopefully push them off into the world and set them for bigger things” (Meredith, 2023). In this sense, it is evident that the traditional record company business model is challenging in the current climate, with revenue not moving around the sector as it had previously. While several small labels in Scotland still follow the traditional model, others have adopted alternative frameworks. A new venture from the Glasgow-based label Last Night From Glasgow is challenging conventional notions of curation via its patronage model. Operating as a not-for-profit organisation, the owner seeks to reinvest finances into additional music projects whilst offering fair remuneration for all parties.

Since digitalisation, there has been an upsurge in entrepreneurial activity amongst music creators. The internet, digital distribution services and social media have given music creators the option to become self-contained businesses (Dumbreck and McPherson, 2016, p23). Scottish-based artist Malka demonstrated her business model based on receiving revenue for synchronisation deals and, more recently, via commissions through her Hen Hoose songwriting collective. Malka explained, “Going to play 14 festivals in the summer when they’ve (her children) got school holidays, it’s not really realistic” (Schlesinger, 2022). It was evident that childcare was a barrier to working; however, changing the method of value creation led to additional revenue opportunities. It is worth noting that none of the three companies Malka uses for Synchronisation opportunities are Scottish-based. Artist C Duncan pursues a more traditional path of value creation. Signed to Bella Union, he follows the recording and touring of material. However, his music education at the Conservatoire in Glasgow qualifies him to receive commissions for classical compositions (Duncan, 2022). The descriptions of value creation suggest that in the current landscape, various business models and opportunities can be utilised to create revenue that does not involve working with a record label. However, a music publisher believes that for current indie artists in Scotland,

“there’s a sort of shelf life or like there’s a cap people reach, maybe 50,000 or 60,000 streams on Spotify, but then that’s it” (Montgomery, 2022). The data suggests that it is possible to generate revenue from music-making in Scotland, although it does appear more challenging in the current climate.

The transition from music as a product to music as a service has significantly impacted music creators and record labels in Scotland. Streaming services are now the leading source of revenue for recorded music in the UK (UK Music, 2022); however, many music creators do not feel that the revenues generated are fairly redistributed. It has been argued elsewhere that the fault does not lay entirely with the streaming services but also with the rights holders (record labels) who pay musicians after they deduct their percentage share (Hesmondhalgh, 2020). Research into the earnings of music creators has revealed that the economic value of recorded music (tangible and intangible) remains relatively low for music creators across the UK (Hesmondhalgh et al., 2021, p18). A folk musician has highlighted the income disparity between a pre and post-streaming economy, revealing that before streaming sites became commonplace, he could independently sell 10,000 albums at £10 a copy. In contrast, one of his most recent albums only sold 2,000 copies (Napier, 2021). Although his assertion suggests that streaming services are responsible for the fall in sales, there are other possibilities which he did not discuss.

Intellectual property generated by music creators is critical to any commercial music sector. Record labels and publishers often receive the highest incomes as they own the rights through contract agreements with music creators. However, as music has become a digital product for most consumers via streaming services, new opportunities to exploit music have become digital, too, indicating that publishers have grown to have an increasingly prominent role in value creation.

Scotland has a rich history of songwriters (Calvin Harris, Lewis Capaldi, The Proclaimers, Frightened Rabbit) enjoyed domestically and internationally. Scotland’s current roster of artists is arguably the strongest (economically and culturally) Scotland has seen in some time based on their streaming figures and size of touring venues. However, the Scottish music industries have an enduring issue with retaining intellectual property as there is only one commercial publisher in the country (affiliated with a London-based company, Nottinghill Music).



No popular Scottish artists have publishing deals in Scotland, with almost all songwriters signing contracts with international publishers. UK Music disclosed that revenues from publishing activities were around £459 million in 2018 (UK Music, 2019). The estimation of Scotland's publishing sector in chapter five for the same period reveals a staggering difference, with Scotland estimated to have generated around £100,000.

## Live Music

“The potentially huge revenues realisable from live performances in big arenas and stadiums, lucrative brand endorsements and income from merchandise tend to be possible only for the minority of established major superstars” (Negus, 2019, p375)

The live music sector is the dominant method of value creation within the Scottish music industries. The value generated from live music activities sustains multiple stakeholders across the sector. The economic relevance of live music is highlighted annually by UK Music. In 2019, the UK generated £1.3 billion from live music activities, whilst recorded music revenues were far lower at £630 million. Additionally, music tourism in Scotland for the same period saw revenues of £453 million from direct and indirect spending, supported by 4300 full-time OTE jobs (UK Music, 2020). Although the revenues generated within Scotland are impressive, most of the earnings for music promoters and festivals are generated by artists from outside Scotland; however, this situation is not unique to Scotland. Although live music can be a lucrative business for some musicians, not all genres of music have equal opportunities. Popular music often generates higher revenue than more traditional types, such as jazz and folk.

Although the infrastructure is in place within Scotland to exploit artists and sell tickets, the ability to do so is often based on an artist's recorded music output. Those with high streaming figures are often capable of selling more tickets, which indicates that the value proposition is a prominent component of value creation in the live sector. However, online popularity does not always equate to high ticket sales.

Music promoters are the crucial cog in the live sector, providing popular touring bands and local acts through a contractual agreement with a guaranteed economic return for a live performance in a music venue or a festival. In this sense, the live sector delivers a guaranteed method of generating value for artists compared to the recording sector. The strength of the live sector in Scotland can be illustrated by the takeover of DF Concerts by Live Nation (Cloonan, 2010) and, more recently, Regular Music, which was acquired by Deutsch Entertainment AG, which now has a controlling stake in the company (Williams, 2022). Both examples give weight to the economic value-creating properties of the sector for both domestic and international artists.

The role of music promoters is not limited to staging shows. In many respects, some have taken on a role similar to that of A&R by working with artists before they are signed to a record label. Promoters assist new, upcoming local artists by offering them support slots with touring acts as a way of growing their fanbases and helping with career development at defining moments. One manager from Maniana Music explained, “The promoters at DF Concerts helped us a lot with creating the buzz around Joeseff; the support that we get from them is incredible” (Scougall, 2021). The purpose of investing in these acts early in their careers is to create a working relationship which will be honoured should they become successful and move to bigger venues in the future.

## Consumer Value

Whilst music consumers have previously remained passive in value-creation, Choi and Burnes have argued that “value is not created solely by producers in the market, but is co-created by the consumers of products and services” (2013, p39), with research indicating that value co-creation from consumer activity is possible across recorded and live music (Saragih, 2019). The digitalisation of music, combined with consumer electronics, the IT sector and telecommunications, has helped connect music creators and consumers in what Hesmondhalgh and Meier call “networked mobile personalisation” (2017, p1556). Access to music has been a fundamental challenge since music’s inception as an industry; however, new technologies have played a significant role in negotiating the space between creators and consumers (Bruenger, 2019). Although social media sites such as

Facebook and Twitter were created as social tools, they have since been utilised to assist artists in building fanbases and maintaining interaction, which aids with monetisation strategies.

Value co-creation activities have provided Scottish creators with the tools to bypass traditional value-creation routes, such as record companies and publishers, as many of the roles and responsibilities can now be performed by artists. Web 2.0 has delivered several services, such as social media and infomediaries, which are utilised to deliver content that consumers can circulate via online websites. Scottish artist Gerry Cinnamon is a prime example of the possibilities presented by internet technologies. Cinnamon grew his fanbase without any record label by embracing and encouraging significant online word-of-mouth with the help of his fanbase, which shared digital content (Paine, 2020). Nambisan and Baron call these online spaces of interaction “virtual customer environments” (2007, p42). Within four years, Cinnamon evolved from a relative unknown to selling out two nights at Hampden Stadium due to his fanbase and their online support. Whilst this example is notable, it is worth stating that it does not reflect the experiences of most music creators, with research from Haynes and Marshall (2018) indicating that there is uncertainty regarding its actual impacts.

The development of the app economy has assisted in delivering content to consumers in new digital forms. Mobile phone applications such as TikTok host music clips that music creators upload to integrate into videos, which users then upload online. TikTok is particularly useful for music sectors as 50-60% of the core user base is 13 to 24-year-olds, who are the key demographic for value co-creation activities (Toscher, 2021). Scottish singer-songwriter Katie Gregson-Macleod signed a record deal with Columbia Records after a video of her performing went viral on the app (Tiwari, 2022). In this way, music becomes content for users rather than a product, which Negus explains is “circulated in the hope that it will be ‘used’ in a manner that allows it to be monetised” (2019, p371).

It can be deduced that the value-adding qualities are now identifiable with online reviews too. In this sense, consumers who critique music have also become defacto value generators. Whilst all media types have the ability to drive commodity sales for an artist, they also have the power to bestow music creators with cultural value.

## Value Extraction

As previously discussed, a value proposition is essential as it is the launchpad for all other value transactions. Intermediaries then use the cultural text in the music sector to generate value for themselves and additional value for music creators. In many cases, this helps keep the sector healthy. However, there are instances when intermediaries extract economic value without helping to add additional value or reintroducing value for other stakeholders.

The extraction of value from the Scottish music industries is a significant issue demonstrating a flawed infrastructure. The recording sector and publishing operate around IP, which derives from the work of music creators. As detailed in Chapter Five, the value generated from IP returns to those who own the rights. The exploitation of IP is often performed by record labels and publishers who are “rent-seeking” (Mazucatto, 2017, p4), which refers to generating economic returns without producing anything new. With the most prominent commercial acts aligning with major or large independent labels outside Scotland, their revenues remain outside the country. As one grassroots promoter explained, the work of high-profile Scottish artists “is an input into a UK or English music industry a lot of the time because the industry is based in those places” (Stewart, 2022).

An additional concern is outsourcing work to intermediaries based in London due to the strong business network. In some instances, stakeholders were conscious of this and actively sought to keep as much activity within Scotland as possible (Interview 1, 2021). The research presented in Chapter Four reveals that specific elements of the sector are underrepresented or lacking in scale. In these circumstances, there is a shortage of opportunities, which directly causes the employment of intermediaries from other countries.

A longstanding issue for music creators remains retaining the total value they create without “value slippage” (Lepak, 2007; Oskam et al., 2021). Elsewhere in the thesis, we have discussed revenue streams and potential ways for music creators to generate revenues by retaining the rights to their songs. However, it is common for music creators to sign away the rights to their recordings to record

companies, publishers or distributors (Hesmondhalgh et al., 2021, p44). In turn, this decreases their revenue via physical sales and streaming services. However, by working with key intermediaries, music creators can add potential value to their products by association and access to a wealth of experience (Bowman and Ambrosini, 2000). Intermediaries are required to make value judgements based on the use value of the text. Industry stakeholders must determine whether they believe they can exploit the text to a reasonable degree to make a profit. In the process of agreeing on contract agreements, value slippage often occurs, particularly for new artists who require more bargaining power. In this sense, the value generated by music creators is lost to other intermediaries without fair remuneration.

Blockchain technology (BT) is a potential solution to value slippage as it can compensate music creators directly, removing many traditional intermediaries and retaining additional economic value. Baym et al. explain that “a blockchain offers a multipurpose, decentralised, permanent, transparent ledger” (2019, p404), implying that revenues can be easily traced and will return to the rightsholder more expediently. In line with value co-creation principles, BT can co-exist alongside creators, consumers and other intermediaries in the music industries to help deliver higher levels of economic value. However, new digital technologies offer unique methods of making, distributing and publicising music while simultaneously bringing issues of control and remuneration. BT will not benefit everyone. Most likely, artists who already have an established fanbase will have the potential to generate higher revenues by collecting rights revenues.

The sale of concert tickets is the highest form of revenue generation across the entire sector; however, digital ticketing agents such as Ticketmaster incorporate around an additional 10% into the original ticket price. The added revenue is extracted and not reinvested back in any way. The secondary ticketing market also affects the sector, with surplus value leaking to ticket touts. The leakage is often identifiable with more prominent acts performing in larger venues; however, there are rare occasions where it is seen at the grassroots level. Secondary ticketing has a long lineage dating back to the 1960s; however, it has only become a significant source of revenue since 2008. Additionally, promoters have been accused of using online sites such as Viagogo and Seatwave to sell vast numbers

of tickets at inflated prices. Notably, no Scottish-based promoters in Scotland have faced these accusations (Behr and Cloonan, 2020).

## Conclusion

Whilst the partner organisation requested an economic measurement of the music industries in Scotland, this chapter has identified other values which could be utilised in future research to provide a holistic valuation of the sector. Although economic value has been highlighted as critical to the operation of any prosperous economy, the intrinsic benefits of music require further exploration. Additionally, this chapter has emphasised that all value creation begins with a music creator. Mapping reports are often only interested in the economic estimations of a sector without any explanation of how or where the revenue originates.

Section two identified the value proposition as a crucial element for intermediaries in their role as value creators. A framework from De Propriis (2019) revealed that their work can be categorised in three ways: Creative intermediation, commodifying intermediation, and outreach intermediation. Bourdieu argued that intermediaries were primarily concerned with economic gains; however, this was proven inaccurate.

Section three examined the types of value generated when resources are integrated. Utilising Bourdieu's theory of Capital (1986), it was revealed that economic capital is not the primary goal of all intermediaries, with more subtle value exchanges, including social, cultural, and symbolic, also occurring.

The final section investigated the Scottish music sector's infrastructure, arguing that it does not have a sustainable business model. Potential revenue is being lost due to the inability to retain IP within the country, as there are no record companies or publishers of scale. Therefore, value extraction is occurring, with revenue leaking to businesses outside of Scotland. Additionally, the section identified the consumer's value-creating abilities with the use of social media sites and digital applications such as TikTok.

## Chapter Seven: What Impact did Covid-19 have on the Scottish Music Industries?

"COVID-19 exposed the serious fault lines that exist across the creative industries. But for the music industry, this was a painful reckoning of what is and what isn't working" (Henderson, 2021)

This chapter will investigate how the Covid-19 pandemic disrupted the Scottish music industries. Although the global music industries have periodically experienced disruption to business activities, this has exclusively revolved around digital innovations in recent decades, predominantly impacting the recording sector (Hughes, 2016). The Scottish music industries have several areas that lag behind other areas in relation to the UK industry (no recording or publishing companies of scale); however, some of the issues are global concerns (low musician revenues, inequalities with cultural work, a lack of support for grassroots venues and the mental wellbeing of music creators).

This chapter will illustrate that the pandemic only heightened several of these structural flaws, which were already prevalent before lockdown restrictions. Banks and O'Connor argued that to identify the pandemic's impacts, it was first essential to investigate "how the cultural sector stood going into the crisis, what made it so vulnerable over and above the particular impacts of the virus" (2021, p4).

The following chapter will examine the pandemic's effects across multiple academic fields, primarily from a cultural studies standpoint, whilst merging resilience theory. In doing so, the discussion will provide a multi-perspective analysis of the pandemic. This will follow Williams's approach to studying events. He concludes that "while we may, in the study of a past period, separate out particular aspects of life, and treat them as if they were self-contained, it is obvious that this is only how they may be studied, not how they were experienced. We examine each element as a precipitate, but in the living experience of the time, every element was in solution, an inseparable part of a complex whole" (Williams, 1969, p17-18). This critical approach will provide a

holistic synopsis demonstrating how music's socio-economic, political and cultural aspects intertwine.

By building on the work of previous resilience literature in business and management research, this chapter will investigate the music industries in Scotland from two perspectives: the cultural worker and the organisation. Although resilience has numerous definitions across the literature, the following analysis defines it as "the capacity of a system to absorb disturbance and still retain its basic function and structure" (Walker et al., 2004, p1). Resilience theory is applied to situations where a disturbance has occurred, such as new technologies; however, this chapter will use resilience as a conceptual framework to analyse Scotland's music industries to understand the pandemic's impact fully.

The chapter will have six sections. The first will briefly characterise the pandemic and place it within a crisis framework. The second section will examine cultural work in Scotland, arguing that the effects of the pandemic reinforced existing inequalities whilst illustrating the resilience of cultural workers. Section three will investigate the broader impacts of lockdown regulations, asserting that the music sector in Scotland was significantly impacted due to its reliance on revenue from live music. Section four will examine the government's response to the pandemic, illustrating its continued neo-liberal response to the arts. The fifth section will examine Scotland's funding decisions during the pandemic, arguing that a lack of commercial music policy was detrimental to supporting the sector during the pandemic. The final section will offer a retrospective analysis of the estimated economic loss during the pandemic in Scotland by investigating reports from Wales and the broader UK.

## Framing the Covid-19 Pandemic

The pandemic was, first and foremost, a global health emergency. The World Health Organisation declared the outbreak a global pandemic, leading governments worldwide to impose various health protocols to stop the spread of the disease, including social distancing measures, national lockdowns, and travel bans. The announcement of initial restrictions in Scotland took effect on the 23rd of March 2020. First Minister Nicola Sturgeon explained that the "stringent



restrictions on our normal day-to-day lives that I'm about to set out are difficult and unprecedented. They amount effectively to what has been described as a "lockdown" (The Scottish Government, 2020b).

The Scottish music industries faced severe challenges due to the socio-cultural nature of live events. Although there were brief periods when regulations were lifted, the live music sector was effectively closed from March 2020 until July 2021, with the implementation of smaller lockdowns identified into January 2022. Workers from all sectors of the economy were instructed to remain at home unless employed in what became known as essential professions, such as NHS staff, care workers, those working in supermarkets or similar occupations. Additionally, individuals were to adhere to a strict two-metre distance outside the home.

It was not the pandemic itself but rather the regulations imposed by the government that affected music activity. Live music encountered the most significant economic and social impacts alongside travel, tourism and hospitality. The restrictions introduced by the government effectively prevented music production in group settings. Although lockdown measures were eased and, in some cases, lifted for periods, the live music sector was one of the first economies to close and one of the last to reopen. Throughout this time, the creative and cultural sector could be characterised as "VUCA: volatile, uncertain, complex and ambiguous" (Sargent, 2022, p12).

This thesis will frame the pandemic as a crisis aligning with current creative sector research (Walmesley et al., 2022). Using Hall's (1988) examination of a crisis as a starting point, it is evident that analysing the music industries alone will only deliver a reductionist viewpoint. Therefore, starting from a cultural studies perspective will allow an in-depth analysis of the pandemic's social, cultural, economic and political aspects.

The remainder of this chapter will reveal that the dominant narrative of the pandemic was a crisis in the live music sector. However, what will become apparent are the structural flaws that came to the forefront due to lockdown restrictions. In this way, the chapter will follow Antentas, who asserts that "(c)risises are moments of simplification of social relations and clarification of reality. They reveal the hidden which we usually do not see" (2020, p316).

## Sectoral Challenges prior to (and accelerated by) Covid-19

"There is already a crisis in the cultural and creative industries" (O'Brien, 2020)

Although there are around 10,373 music jobs in Scotland, 9157 are carried out by freelancers (SMIA, 2020a). Despite the precarious and uncertain working conditions, individuals continue to enter the music industries in Scotland. The following section will argue that operating under such conditions has constructed psychological resilience, which aided cultural workers during the pandemic. The following section will investigate the resilience of cultural workers based on Luthar et al. They propose that resilience is a "dynamic process encompassing positive adaptation within the context of significant adversity" (2000, p543). Resilience often refers to the ability to bounce back after disruption; however, in the current context, it refers to an individual's response to the crisis. It will become evident that cultural workers have psychological resilience, a valuable tool during the pandemic. At the employee level, the term has been used to refer to the ability of organisational members to bounce back and even succeed in the face of hardships and adversity (e.g. Luthans et al., 2010; Shin et al., 2012)

Cultural workers are known for their adaptive behaviour. Tales of change and creativity were disclosed throughout interviews conducted for this study. Lisa Whytock from Active Events explained, "The main thing was keeping the artist going, so I came up with lots of different projects" (2022). Her ethos aligns with recent research (Giustiniano et al., 2018; Lombardi et al., 2021), demonstrating that resilience has two stages: adaptive and reactive.

## Portfolio Careers

The term gig economy originated in the music sector to describe the precarious working life of music creators, although it has since extended to other sites of cultural work (Haynes and Marshall, 2018). Consequentially, portfolio careers became commonplace, with creative and cultural workers utilising various job

opportunities to make a living (Neely, 2020). The precarious nature of employment has provided cultural workers with the skills to negotiate disruptions when they occur in the creative economy, as many workers are accustomed to moving from role to role. From an educational standpoint, preparing aspiring musicians and intermediaries wishing to enter the music industries to the realities they will encounter is vital. As a part-time musician, Smith believes "we all have portfolio careers, pieced together from a mixture of high-profile performances, low-profile gigs, teaching, journalism, composition, and all manner of music-related and non-music-related work" (2013, p33). A music educator, creator and community music worker builds on the intention of a portfolio career, explaining,

"In a nutshell, I think the key thing for me has been trying to sort of sustain, and you'll find this with so many different people has been trying to sustain different forms of a creative life... As it is a life, you know, it's a life choice" (Scott, 2022).

In this sense, both Smith (2013) and Scott (2022) follow Freidson's (1990) rationale for carrying out creative work, with Friedson explaining the calling as a labour of love with the ambition of feeling fulfilled. The immediate observation from conducting interviews was the satisfaction cultural workers acquire from their activities, which corresponds with Hesmondhalgh and Baker's (2010) concept of good work in several respects.

Those interviewed seemed satisfied to work in an industry that offered little job security and saw individuals overworked. This suggests that involvement in a job that offers fulfilment, and pleasure is more rewarding than traditional work benefits such as high economic return and normalised working patterns. The topic was alluded to by an independent promoter from Aberdeen, who explained the reason for doing his job was "not really about the money" (Calder, 2021), whilst a festival organiser was more direct by referring to the artists she works with and helps as her "babies" (Rodgers, 2022). Both examples infer that there are more deep-rooted motivations for executing their jobs than to make a living.

Those who enter the music sector working towards a specific role spoke of moving between positions until they found something they enjoyed (Interview 1, 2021; Scougall, 2021). Again, this reveals a longing to work within a specific sector

rather than a specific job. Additionally, several workers interviewed (Scott, 2022; Duncan, 2022) recognised that the need to make a living as a creative worker meant they had to find additional employment at certain times to continue their creative occupations, which they would find within the music sector.

## Individualisation

"The individualised person must shoulder the consequences when things go wrong. This is an uncertain and precarious life to lead" (McGuigan, 2010, p333).

The notion of individualism is especially relevant in the music industries, affecting freelancers and those within many SMEs. Although several large organisations operate across Scotland, most occupational activities are performed by individuals. Research reveals that even full-time employees also participate in additional projects (Rodgers, 2021; Scott, 2022; Schlesinger, 2022). Symbolic creators also experience the precarious nature of employment. As highlighted in Chapter Four, music creators participate in several areas of employment.

The precarious nature of working in music was not a deterrent for those interviewed. One festival organiser acknowledged that their job was becoming more difficult each year with cuts to funding; however, they did not seem to view this as an obstacle and endeavoured to find methods to continue in their role (Rodgers, 2022).

An important aspect of portfolio work is the ability to network with peers. Engaging with contemporaries across the music sector creates opportunities for collaboration and job prospects. Blair refers to this as active networking, the act of "purposefully using network connection(s) to source and transmit job information" (2009, p120). However, as Blair explains, networking participants must have commonalities, such as social class or similar capital levels, to connect successfully.

Although active networking occurs across the music industries, it raises questions regarding inequalities, especially the entrance to specific jobs or roles. It has been proposed that the creative industries were a meritocracy where accessibility was

fair and just (Florida, 2012). However, his theory appears to be incorrect. There are evident inequalities identifiable across Scotland. These imbalances are not new; they have been heightened due to the pandemic. Survey data reveals negative characteristics identified by respondents regarding inequalities. Of those that replied to the research survey, over 96% of respondents were white, with less than 1% representing Mixed or multiple ethnic groups and less than 2% representing Asian or the Asian British community.

Furthermore, 67% of respondents were male, 28.4% were female, 1.8% were non-binary, and 2.8% did not want to respond. Create London revealed that only 18.2% of those working in music and the performing arts are from working-class backgrounds. When race is incorporated, the figure drops to 4.8% for those coming from black and minority ethnic backgrounds (O'Brien et al., 2018).

The data indicates apparent inequalities among those wishing to enter the music industries as a profession; however, sample sizes are not adequate and should be more extensive to reflect the industry as a whole. Nonetheless, it does support more comprehensive research investigating the culture sector, with O'Brien and Oakley stating, "the cultural industries are less ethnically diverse, more male and skewed towards those of a higher socio-economic background than most other parts of the economy" (2015, p11). Those with meritocratic views tend to be white males in high-paid jobs, whilst younger precarious workers tend to be critical of ideas of equality (Taylor and O'Brien, 2017).

The consequences of lockdown regulations have led to a loss of work across the music industries and a decline in revenue. Those most affected were freelancers and those on temporary work contracts. Individuals from middle-class backgrounds with family support and accumulated capital would see the pandemic with ease (Banks, 2020). However, working-class individuals, especially females and ethnic minorities, would most likely leave their occupations and not return to the sector post-pandemic. A longitudinal study from Walmsley et al. (2022) supports Bank's initial theory of disruption to the creative workforce.

Furthermore, as highlighted in chapter four, revenue for musicians is often a combination of music and non-music activities, with financial assistance from friends and family remaining a prominent source of income for many music

creators. It is estimated that around 46% of creators received financial help at different stages of their careers (UK Music, 2018), demonstrating that those from higher socio-economic backgrounds have an advantage over those from less affluent families. Before the pandemic, music creators led financially precarious lives, with many existing on low incomes. It is estimated that 56% of musicians earn less than £20k a year, which aligns with the primary research for this thesis. The wages come from several activities such as teaching, recordings, performing live, royalty payments and session work (Musicians Union, 2010).

## Mental Health and Wellbeing

Aside from the well-documented economic and employment hardships, the music industries have received attention for their heightened adverse mental health statistics. The literature identifies music creators as most at risk (Gross and Musgrave, 2022); however, I would assert that intermediaries supporting the creation and delivery of music, especially those in the live sector, are equally susceptible as they are exposed to the same working conditions. With long periods of touring, intermediaries leave behind families and become exposed to the excess nature of life on the road. Long days, lack of sleep and easy access to alcohol combined with precarious employment patterns can lead to similar results in their wellbeing. It is estimated that musicians are three times more likely to experience anxiety and depression than the general public (Krueger, 2019).

Lockdown restrictions and a complete loss of employment across the live sector saw increased support for mental health from Help Musicians (2021). A survey of over 700 musicians indicated that 87% of individuals reported declining mental health since the pandemic began. However, the additional concern of Brexit and the impact of long-term touring in Europe were also factors. A 40% increase in support was noted in 2020, whilst 2021 saw a rise of 65%. In this sense, lockdown restrictions have heightened what is already a challenging situation for many music creators.

## The Immediate Impact of Covid-19 on the Scottish Music Industries

Disruptions within the global music industries are not uncommon. Instances of new listening formats, from the gramophone to vinyl records and then the compact disc, have frequently displaced the recording sector. These disturbances have become known as disruptive innovations (Moreau, 2013). The Covid-19 pandemic is the first instance of a global health emergency disturbing an entire business sector. As noted above, previous industry disruptions have affected recorded music; however, the lockdown restrictions imposed due to social distancing measures resulted in the closure of all live, in-person events. Therefore, the impacts can be characterised as economic, social, cultural and political.

Scotland's music industries are unlike those of England and many other countries (with the notable exception of Wales) in that they do not revolve around the core three sectors of recording, live and publishing. Instead, Scotland operates around a robust live sector (Williamson et al., 2003; Ekos, 2014). The following section will argue that the Scottish music industries were impacted significantly more than other music ecologies due to their reliance on live music as their primary source of revenue and value creation. It is estimated that in 2018, live music in Scotland contributed £494 million to GVA through activities related to travel and tourism (UK Music, 2019). Based on sector earnings identified in Chapter Five (Appendix Eight; Appendix Twenty), it is evident that recorded music and publishing activities generate significantly less revenue than live music. As a consequence of those revenues disappearing, the impact on additional sub-sectors across the country was severe, particularly for music creators. A more robust infrastructure may have softened the impact slightly, but it would not have remedied the situation.

### Disruption of the Live Music Ecology

The nature of live music is not replicable; it can only be experienced by attending an event at a specific time. Additionally, a live music event requires a locale for a performance to occur. As Fuchs explains, "(a) locale is a particular physical or virtual space that is used at a particular time, typically in a routinised manner,

which implies repetition, for social actions and communication that have a particular goal" (2020, p379). The implementation of national lockdown measures and social distancing rules signified it was impossible to proceed with in-person events, resulting in the cancellation of all socio-cultural events. Consequently, promoters, music venues, music festivals, event production suppliers and specialised touring crews were instantly affected by a loss of work (UK Music, 2021).

National media coverage was primarily related to the impact of live events, although there was some dialogue regarding music creators. Initial articles discussing the implications of the pandemic warned of doomsday scenarios with job losses and companies collapsing in economic ruin. Dredge explained, "tours and festivals have been cancelled or delayed, leaving a gaping hole in this year's earnings for artists and ticketing companies alike. For many venues and promoters, meanwhile, it's a genuine existential threat to their businesses" (2020). The sentiment was echoed by an anonymous music promoter in Scotland in the first week of lockdown who explained that "a lot of people operate on a financial knife edge and closing venues, even for a few weeks, could be a disaster" (Inglis, 2020). As with other creative sectors, impact reports emerged, highlighting the need for immediate fiscal support with warnings of mass unemployment.

Literature from The Concert Promoters Association (Carey and Chambers, 2020) and UK Music (2021) demonstrated a unified message from the UK sector. The sector provided multiple accounts of what they perceived as an economic crisis, revealing that the total loss of revenue for live music could be between 81-90% by the end of 2020. Within crisis management literature, this is known as sense-making. Boin et al. define this as "collecting and processing information that will help crisis managers to detect an emerging crisis and understand the significance of what is going on during a crisis" (2017, p15). Although the government had no real sense of what the creative sector required, specific sectors pre-emptively provided the data to expedite fiscal support.

As one live agent explained, within Scotland, "nothing was happening at all" (Whytock, 2022). As a result, key stakeholders from the commercial sector came together to form the Scottish Commercial Music Industry Taskforce (SCMIT) in April 2020. The group immediately published an open letter to the government



pleading for intervention. The purpose of the open letter from SCMIT and the additional impact reports was essentially a call for help. In this sense, by exposing the fragility of the music industries, SCMIT hoped the government would be compelled to support music after being called out on a public platform (Banks, 2020).

Research prepared by SCMIT for the SG suggests that the primary consideration was related to the live sector with the inclusion of artists and music managers. Although the report did not include music venues, they were raised as a primary concern. The exclusion arises from the fact that they had previously received funding. Although not explicitly stated, this indicates live music's importance within the sector (SMIA, 2020a). Additional research reveals that almost three-quarters of those surveyed make a living from live music, whereas less than a quarter receive income from the recording sector. Although the sample size is not significant (51 responses), it is indicative of the broader industry structure within Scotland (SMIA, 2020b) and is in line with empirical research for this thesis. Other areas of music activity in Scotland provide revenue to the economy; however, much of this comes from earnings induced by live music.

Additionally, the SMIA provided economic figures required to support Scotland's music industries. Monthly fixed operating costs were estimated to be around £1.5 million, excluding freelancer costs and salaries. The data also revealed that the industry required £8.3 million to support, restart and recover. The figures for both estimations relate to artists, agents, managers, festivals, promoters and production suppliers, again, all directly linked to the staging and production of live music (SMIA, 2020a).

## Restarting Live Music

UK Music provided several initiatives to emphasise the disruptive nature of the pandemic on the live sector to secure a roadmap back to full-capacity gigs. Let The Music Play (UK Music, 2020a) was launched on the 2nd of July 2020 and was aimed at promoting the live sector and its significance to the economy in the UK. The endeavour requested the government conduct three tasks: first, provide a clear and conditional timeline regarding the startup of gigs, a support package to

aid in the continued survival of businesses and their staff, and a total exemption of VAT regarding concert tickets. The request also identified the need for an insurance scheme backed by the government, which would help curb the impact of cancelling shows and festivals due to Covid-19.

The second initiative, Save Our Summer (UK Music 2021a), was launched in January 2021 and was a follow-up report from Let The Music Play. Once again, a meaningful start date for gigs was requested alongside the need for a government-supported insurance scheme. Although Let the Music Play was successful with the VAT request, an extension was now required with an extension to the business rates relief.

It is understandable why UK Music and the broader sector desired an indicative date for live shows to resume; however, the government was clearly in a challenging position with Covid-19 infection rates rising. One area where there was an apparent failure in both Westminster's and the SG's position was the need for provision regarding insurance policies for festival cancellations. A £750 million scheme was finally announced in August 2021, with the government acting as a guarantor to insurance companies providing cover to UK festivals. However, this was too late for many festivals in Scotland, with Doonhame, Party at the Palace, Rewind Scotland, Summer Nights, and Belladrum all cancelled or rescheduled to 2022, whilst TRNSMT moved to September 2021 (BBC, 2021).

## Music Sector Impacts: Initial Assessments

It is estimated that music creators' earnings dropped by 65% during the pandemic to around £8000. The figure would rise to 80% if musicians relied on live revenue and session work (UK Music, 2020d). Music creators in the commercial sector operate in activity cycles, often beginning with writing, then recording and finally touring a product (album). Depending on where an artist was in that cycle during the pandemic would impact them differently, with one artist explaining, "I was very lucky that I'd finished an album and had done the album tour just before everything hit" (Duncan, 2022). Although some creators were fortunate to be at the end of their album cycle, others had to rely on savings to survive. Those savings would have been invested in recording and promoting a new record. According to one

manager, the impact on creators will cause ramifications for three to four years post-pandemic explaining, "that lost growth, all that lost investment. Those lost live shows where bands and artists pocket the money and say right, we will put that towards our next record, it's kind of all gone" (Interview 1, 2021).

The loss of earnings for musicians has more comprehensive implications for those representing them. Music managers and booking agents encountered a steep decline in revenues due to lost earnings by music creators. Chapter five indicated that managers receive around 20% of their artists' earnings, whilst booking agents acquire around 10% of all live earnings, with the MMF reporting that 80% of a manager's income is generated from their artists performing live (UkMusic, 2020d). Music Manager Lyle Scougall confirmed the impact of show cancellations, especially as one of his acts is a DJ. He explained, "they make all their money from live. Obviously, that was out. We lost a lot of potential revenue last year through that" (Scougall, 2021).

Like those in the live sector, music managers and booking agents continued operating despite having minimal or no income. Live music agent Lisa Whytock (2022) explained that she was "constantly rescheduling" shows, with another manager explaining, "Me and the team I work with have just been trying to keep businesses alive, keep people sustained through whatever route we can find financially to get them through this period. So yeah, I've never worked this full on and as hard as I have done in the last 18 months" (Interview 1, 2021).

The decimation of the night-time economy inadvertently harmed the revenues that CMOs collect, who in turn pay to music creators, publishers, record labels and rightsholders. PPL disclosed that in 2020, they experienced a 17% decline in revenues collected, mainly due to public performance and dubbing, which fell by 42.2% (PPL, 2021). Additionally, PRS for Music reported a 19.7% decrease in revenues collected on behalf of songwriters, composers and producers. Again, the most significant consequence came from the live performance of music, which saw a 61.2% decrease (PRS, 2021). A Publisher repeats this sentiment, stating, "a large portion of our income comes from, well, it did come from a lot of live shows, but obviously, there's not been any live shows the past two years (Montgomery, 2022).

Record labels fared relatively well, with the sale of vinyl and streaming figures reaching record highs after an initial fall in numbers. However, independent labels, particularly those operating in Scotland, require the back catalogue of artists on their roster to rely on for revenue from rents. Recording studios were impacted by social distancing and lockdown regulations. Studio diaries are booked months in advance, with producers and engineers reliant on long-term income; however, this evaporated overnight. The Music Producers Guild (MPG) estimated the loss of around 70% of revenue in the first month of the lockdown (UKMusic, 2020d). Overall, the revenues generated from recording studios and those who work in them fell by around 50% in 2020 compared to 2019 (UKMusic, 2021b).

The data indicates that the music industries in Scotland are a perfect example of a complex system which "has many 'moving parts' (people, products, processes) that are relatively simple to understand individually, but that act together to be productive and efficient without the benefit of a controlling authority" (Bruenger, 2019, p12). Disruption in one sector can cause a ripple effect across additional areas of economic activity, affecting multiple elements of the music sector. However, music creators began to rethink and re-strategise ways to connect with fans by creating new revenue streams. Additionally, enterprises analysed their business models to find new ways of delivering goods and services.

## Alternative Business Models

"We did some remote writing camps which were really really good and hopefully boosted the morale of people" (Montgomery, 2022)

The austerity measures imposed by the Conservative government during 2010-2015 resulted in cuts to culture across both the funded and commercial spheres. Despite the decreased funding, cultural activities continued flourishing, with the creative economy expanding. The sector's ability to grow was not based on the amount of funding it received or did not receive but related to the adaptability of its operations. In this sense, the cultural sector received recognition for bouncing back and showing strength in the face of hardship (Pratt, 2019). Unsurprisingly, the pandemic brought about renewed calls for resilience.

The following section will illustrate that the live music sector displayed entrepreneurialism and resilience during the pandemic by altering its core business model. It will use an organisational resilience framework to identify and analyse the sector's initial response and the adaptability of business models (Kitsos and Bishop, 2018).

As the in-person delivery model was impossible, businesses and individuals investigated alternative delivery methods focused on digital tools. There are three strategies which businesses can adopt in order to endure a crisis (Wade and Bjerkan, 2020):

- Strategy 1: Same Products, Different Channel
- Strategy 2: Same Infrastructure, Different Products
- Strategy 3: Same Products, Different Infrastructure

The role of technology within the music sector has historically faced backlash due to its disruptive nature; however, digital opportunities were embraced during the pandemic, with musicians welcoming the opportunity to connect and be innovative in the digital world (Daffern et al., 2021). By utilising digital platforms, musicians and artists took their live performances online to a digital locale (Fuchs, 2020). Although live streaming is not a new phenomenon (Kaufman, 2009), it was the primary means for musicians to connect with their fans (Haferkorn, Kavanagh and Leak, 2021). Performances generated revenue by selling tickets or viewers could donate to a virtual tip jar. Early in the first wave of lockdown, it became evident that live shows with audiences would not be possible for an extended period, leading to several high-profile streaming shows from artists such as Biffy Clyro (Daly, 2020). It is fair to assume that the income from these events could be substantial for an established act. However, for the large majority, it would provide no real financial support. Whilst some used streaming as an opportunity to generate revenue, others saw it as a way to socialise and raise morale.

DF concerts attempted to produce live events whilst adhering to strict attendance and distancing regulations, which apply to strategy three. In a similar vein to drive-in movie theatres, the planned shows were due to take place outdoors with

individual viewing platforms; however, rising infections and localised lockdowns led to the project's cancellation (Dingwall, 2020).

The commercial sector attempted to alter its revenue streams from in-person to digital service models. Additionally, attempts were made to deliver live performances within the government guidelines. However, as hindsight has shown, these methods were short-term solutions. Although digital technology was used to alter the delivery of live music performances during the pandemic, live-stream gigs have since ceased, with music venues reopening and festivals taking place again.

## The UK Government's Response to a Cultural Crisis

The UK government continually promoted cultural policy activities as investments rather than subsidies, dating back to the 1980s when Margaret Thatcher slashed cultural support. However, the funding of public arts took an instrumental approach, which, according to Belfiore, "overshadowed arguments that defended subsidy based on the "art for art's sake" principle" (2004, p188). The move from culture to creative industries further removed commercial music activities from funding discussions. What remained was the public sector, which was required to prove its worth to receive financial subsidies, and the commercial sector, which received input in the form of regulatory support. Couldry describes the neoliberal turn to a free market as "common sense" (2008, p4). In this way, music was not viewed as culture but as a commercial activity that was part of the free market.

The outbreak of the global economic crisis of 2008 led to a renewed interest in creative activities, with the creative sector frequently recognised as a highly dynamic part of many economies that seems to be more resilient to economic recessions compared to other sectors (Protogerou, 2021, p1076). However, the typical laissez-faire approach was not suitable for navigating the pandemic. Although it will be revealed that the UK government introduced several socialist policies, albeit under duress, the following section will illustrate that the overwhelming approach remained neoliberal.

## Emergency Support for Workers

The UK government introduced several fiscal schemes during the initial stages of the pandemic, which could be described as socialist. However, it has been noted elsewhere that this was a forced measure (Banks, 2020). The Coronavirus Job Retention Scheme (CJRS) was the first initiative offered to workers in the UK. Any employer could apply for 80% of their staff's salary with the caveat that it would not exceed £2500 monthly. Delivery came from a grant and would be provided to any sized company, charity or non-profit organisation to workers who contributed tax through PAYE (BBC, 2020b). However, it became apparent that the self-employed would require further support. Six days after announcing the CJRS, the Chancellor revealed plans to launch the Self Employment Income Support Scheme (SEISS).

Although the SEISS was a welcome addition to the support offered by the CJRS, it was flawed. Successful applicants were required to earn more than 50% of their income from self-employed activities whilst earning no more than £50,000 a year. Applicants were also required to be self-employed for more than twelve months and not be part of a limited company that received income from dividend payments. Rishi Sunak offered assurance that the scheme would protect 95% of the self-employed. However, only 62% of applicants were successful, leaving many working in the music industries without financial support (HelpMusicians, 2020).

It is estimated that 15% of staff within the live sector found employment elsewhere, with 76% receiving financial support from one of the previously mentioned government initiatives. Therefore, job losses across the music sector appear lower than early projections. However, this is likely due to the disproportionately high ratio of freelancers in the sector. As stated earlier, the music sector in Scotland has around 1216 full-time employees, although the number of freelancers is much higher at 9157. The highest number of those are music creators, 36%, with

festivals employing around 30.1% and production workers covering 29.8% (SMIA, 2020b).

It is evident that Westminster did not understand the complexities of the music workforce. Those who create music and cultural workers who operate within the Scottish music industries function by utilising portfolio careers as freelance or self-employed individuals, many of whom did not conform to the government's parameters for fiscal support. Clearly, a market failure occurred due to lockdown restrictions placed on the music sector; however, many were resigned to looking for alternative employment rather than financially supporting those who required assistance. The assertion is further illustrated by the government-supported ad campaign suggesting that workers in the arts and culture sector consider retraining in alternative sectors (Bakare, 2020). As the Chancellor explained in his winter economy plan, the main focus was on "viable jobs" (Miliband, 2020), which was a deviation from Boris Johnson's earlier statement claiming, "This is a time to be bold, to have courage. We will support jobs, we will support incomes, we will support businesses... We will do whatever it takes." (BBC, 2020b).

## Cultural Recovery Fund

This section will demonstrate the UK government's decision to prioritise high-culture organisations, further illustrating their neoliberal agenda. With New Zealand and Germany unveiling packages within weeks delivering support for cultural organisations and workers, the UK remained silent on any support until early July 2020 with the Cultural Recovery Fund (CRF). The joint statement from the Treasury Department and the DCMS revealed £1.57 billion in financial support, which would be delivered to each devolved nation. Scotland received £97m of the distributed funds, equalling around 6% (DCMS, 2020). Although the allocation was calculated using the Barnett formula, no valid working has yet to materialise.

According to Westminster, the CRF was set up "to tackle the crisis that faced our most-loved cultural organisations and heritage sites during the coronavirus (COVID-19) pandemic" (ibid); however, this raises questions regarding who determines which types of culture are worth protecting. It is evident that the fund was in place to support high-art institutions which delivered heightened levels of



economic revenues, as those were the first to receive support. Furthermore, by analysing the Culture Recovery Board, it is clear that no effort was made to include representation from the commercial music industries. Instead, members came from The National Theatre, The British Film Institute and Historic England, to name a few. (ibid). As Belfiore states, "cultural value does not operate and is not generated in a social, cultural and political vacuum, but is in fact shaped by the power relations predominant at any one time, and is a site for struggles over meaning, representation and recognition" (2018, p2). In this sense, the UK government's continual support of institutions with high-art connotations linked to classical music, ballet and museums indicates an apparent lack of cultural democracy. Popular culture must be present in these discussions as the state is responsible for delivering culture to its citizens. After all, politicians have a democratic duty to deliver what the public desires. However, difficulties arise when governments assume they know which forms of culture are best (Street, 2013).

The first cash allocations went to those establishments most in need. In reality, they went to what the UK government classifies as the cultural institutions that deliver the highest cultural value; however, how this was gauged is yet to be known. A stipulation proposed by Oliver Dowden, the Culture Secretary, stated that to receive support, those applying would be required to demonstrate how they "contributed to wider economic growth" (BBC, 2020c). As Belfiore points out, pre-pandemic, the UK Government "mostly focused on the articulation and measurement of 'economic value', at the expense of other forms of value" (2018, p1), with the approach continuing into pandemic times too. Judging whether an institution delivers economic goals alone is unjust when the cultural sector delivers more than financial gain to the economy (see Belfiore and Bennett, 2008).

The slow response to protect commercial culture highlights the UK government's attitude towards what they perceive as an industry rather than cultural activities needing protection. In many respects, the responsibility lies with the Cultural Industries themselves. For years, industry sectors, including the music industries, have promoted their activities and revenue-generating abilities by publishing sectoral reports (Edwards, 2021). These reports often promote and emphasise an industry's performance; however, they can often portray the positives, negating any negative or disparaging elements. Therefore, when the time comes for the

government to intervene in a crisis, they may believe that the sector does not require support even if there is a market failure.

However, governments can and have intervened with financial support when there is a sufficient need and enough public demand (Banks, 2020). Although Banks and O'Connor provide several possibilities, the most plausible appears to be the maximisation of "political capital" (2021, p10). Following this logic, the UK government was not interested in providing security but was more concerned with positive optics after an outpouring of public and cultural sector support. Williams referred to this as a "phased advantage", which was part of what he called "Plan X politics" (McGuigan, 2016, p196).

## The Economics of Music Streaming Committee

With the loss of revenues from Live shows, the attention of music creators and the UK government pivoted to income from music streaming services. The UK government established the Economics of Music Streaming inquiry to investigate the economic impact of streaming on music creators and record labels.

It appears that the UK government set up the committee to delay providing fiscal support to music creators as they do not see them as a priority when it comes to culture. The UK government prioritised providing funds to the flagship establishments in London, which deliver high economic returns and are regarded as high-culture institutions (BBC, 2020c). Additionally, the request to retrain in other economically viable sectors indicated the nature of their funding decisions. Although there is no direct evidence, analysis of the Scottish response reveals a more artist-centric approach via several funding channels (Ekos, 2022).

Nonetheless, the committee's investigation was essential in showcasing the poor remuneration for music creators from streaming sites. Data revealed that streaming generated over £1 billion in revenue, with as little as 13% returning to the artist or songwriters (Musicians Union, 2021). Numerous artists have spoken out regarding the issue (Guy Garvey and Tom Gray); however, Nadine Shah garnered the most coverage with her story. Speaking at one of the committee meetings, She admitted,

"The earnings from streaming are not significant enough to keep the wolf away from the door, I have a substantial profile, a substantial fanbase, I'm critically acclaimed but I don't make enough money from streaming and am struggling to pay my rent. I am a successful musician, but I am just not being paid fairly for the work that I make." (Sweney, 2020).

The Ivors Academy and The Musicians Union corroborated Shah's experience in a poll, which revealed that 82% of music creators earned less than £200 from streaming across all platforms, including those with over a million streams in 2019 (Taylor, 2020).

The committee is unquestionably a step in the right direction; however, it is not the first time revenues from streaming have been discussed. A 2014 study from The International Council of Music Creators (CIAM) highlighted songwriters' issues in the digital age. The study revealed that digital streaming services exploit musicians and undervalue music creators and their works (CIAM, 2014). The recommendation of a higher market share and a proposed 50/50 split between songwriters and publishers received traction with the Copyright Royalty Board (CRB). The American institution instructed Spotify and other streaming services to increase royalty pay-out from 10.5% to 15.1% over five years (Ingham, 2022). The streaming services have taken legal action, and the case is ongoing. If the UK committee were to conclude with the same opinion, a fair hypothesis would be similar legal action in the United Kingdom.

## An Analysis of Pandemic Recovery Funding within Scotland

Although Scotland is a member of the United Kingdom, it received devolution in 1998 following the implementation of the Scotland Act. Specific powers were given to the newly formed Scottish Parliament, allowing the country to decide on critical political areas. Although culture falls under the remit of devolved powers, Westminster remains in control of legislation regarding intellectual property and policies concerning broadcasting (Homan et al., 2016). The following section will argue that whilst there were high levels of financial support available, a lack of music policy and understanding of the commercial sector led to a mismanagement of funds.

## Scottish Cultural Policy

Before analysing the policy decisions made during the pandemic, it is first practical to outline how cultural policy determinations are made. Historically, cultural policy was implemented to bring the arts to the public due to their intrinsic benefits; however, in alignment with the UK government, policies veered away from commercial culture.

Since devolution, Scotland has deviated from England on several political junctures, with commentators referring to this as the "Scottish approach" (Cairney et al., 2016). The most significant divergence remains the role of consultation when forming and implementing new policies. Those involved in the policy process have come to be known as "pressure participants", such as unions, interest groups and government organisations at the local level. The willingness to include others in the policy process and to deliver power to local authorities is a clear diversion from Westminster, which delivers a top-down approach.

Pre-pandemic, the Scottish population was highly engaged with culture. Research indicates that 90% of adults participated in cultural activities, with 81% having attended a cultural event or place in the previous twelve months (Scottish Government, 2019a). Although there are reasons to praise the SG for its approach to policy procedure, the recently published Culture Strategy for Scotland (2019b) has realigned its outcomes to be akin to Westminster's. The strategy highlights how culture is a tool that can enhance the population's quality of life and increase wellbeing. Although the NPF requires instrumental outcomes, Orr believes that "many of the actual impacts are as a result of the intrinsic value of culture at every level" (2008, p315). In this sense, the actions taken by the SG can be defined as a combination of intrinsic and instrumental whilst adopting a bottom-up approach to consultation and delivery.

The impact of devolution on the commercial music sector in Scotland remains fairly positive. Cloonan believes that devolved powers "began a process of reducing the distance that has separated popular music in Scotland from policymaking" (2007, p121). Most notably, the creation of a cross-party group to

discuss the music industry and any immediate concerns they had. It is from this group that the SMIA was formed. However, recent research (Behr and Brennan, 2016) reveals the difficulty in generating popular music policy when it exists as both a part of the creative industry and a cultural activity.

## Pandemic Support from Creative Scotland

The following section will illustrate CS's funding decisions regarding the CRF, revealing further complications with the public and commercial sectors. Boin et al. contend that a core component of crisis management is "making critical calls on strategic dilemmas and orchestrating a coherent response to implement those decisions" (2017, p15). The following section will argue that a lack of commercial music policy led to an incoherent and delayed approach.

Westminster distributed the CRF to each member nation in the UK and delivered it without instruction, providing Scotland with complete autonomy on spending. To support the SG, music delegates from all sectors of the music sector came together to form the Scottish Commercial Music Industries Task Force, with the group providing feedback to the SG on how best to support the sector (Stewart, 2022). The SG had two key objectives with the fund: to avert the loss of jobs and avoid the loss of businesses. As with annual cultural funding, the fiscal support for the music sector came from Creative Scotland via three channels:

### Funds for Individuals

- CS Bridging Bursary Fund
- Hardship Fund for Creative Freelancers

### Funds for Organisations

- Cultural Organisations and Venues Recovery Fund (COVRF)
- Performing Arts Venue Relief Fund (PAVRF)
- Grassroots Music Venues Stabilisation Fund (GMVSF)
- Culture Collective

### SG Covid-19 Targeted Support

The SG provided all funds except for the CS Bridging Bursary Fund, which CS independently delivered in its first round. Additionally, not all funds were distributed directly by CS, with several partner institutions chosen to administer support. Unsurprisingly, Glasgow and Edinburgh received over 50% of all funding from 53% of awards.

Overall, music activities received the highest share of all funding provided by CS, approving over 3,500 awards, almost double the closest art form, the visual arts. Around 3000 of those awards went to individuals, whilst the remainder went to organisations. In total, music activities received £15.1 million of fiscal support, with multi-art form organisations the only sector to receive more funding (Ekos, 2022)

Whilst CS delivered adequate support to the music industries in Scotland, the delivery of funds was disjointed in that the financial support did not always go to those most in need. First, the inclusion of nightclubs within the COVRF fund received criticism. After lobbying pressure on the government and CS, the parameters were agreed by which funding would be provided. The decision was controversial; however, nightclubs arguably provide cultural value, which is within CS's remit.

Although CS deserves praise for its rapid response regarding the application and delivery of funds, mistakes were made regarding repeat applications. If an organisation received support from an earlier fund, for example, the GMVSF, then it would not be eligible to apply for later funds where it may have received more fiscal support. In those circumstances, the original application should have received a top-up to compensate for the difference between funds. Lisa Whytock explained her frustration with the deadline date for artist funding, explaining,

"the last round of funding I thought was appalling, absolutely appalling because it was fine for the artists that had shows in December and January, but that funding was for people that had cancellations from December until the end of March, but the deadline for that application was January. Now, half of those shows that were taking place in March had not been cancelled by the time the deadline was in place. When SCMIT argued this with the Scottish government and said you can't do this... what about the artists whose gigs are in April that are going to be cancelled? Or what about the artists who haven't had any

shows in this particular period, and they're not getting any revenue like there needs to be something more that's done" (Whytock, 2022).

Expanding on an earlier topic made by a music manager (Interview 1, 2021) regarding artists lacking funds to go back into the studio to record music or tour, Lisa Whytock expressed concern that some funding could have been put to better use,

"The last lot of money that came was several million pounds, and it was decided that that money was only open to RFOs or not for profits. It was not open to the commercial sector or artists, right? Or artists? And you know what? They couldn't spend it. They had an underspend they couldn't spend it. They were chucking money out the door, and in actual fact, that could have made a huge difference to artists in the commercial sector to restart. I mean, you know yourself, there's a lot of artists that have cancelled tours, particularly in Europe, because they just don't make enough money, like it just doesn't work" (Whytock, 2022).

This point was reinforced by a GMV owner who explained, "there were definitely some mistakes made, especially at the very end of Covid, where they had a pool of money left, and they gave it only to not-for-profit organisations that are already normally in receipt of government funding and don't necessarily rely on ticket sales quite as much" (Stewart, 2022).

Although the SCMIT delivered feedback on the best way to support the commercial sector and what was required financially, it was not implemented. The fault must lay with the SG even though CS chose the successful applicants and sectors for support. However, artist C Duncan was sympathetic in his approach to funding and the amount of pressure placed on the government and CS, explaining;

"I think it was a bit unfair for the arts, but I could see how they just wouldn't understand what it is to do this line of work and what the loss was for a lot of people, and it's just such a complex one that no one at the top really understands" (Duncan, 2022).

Although CS came under fire for these examples, the pandemic unfolded in real time, and decisions had to be made quickly. However, when the SCMIT highlighted the issues regarding deadlines and how money was distributed, nothing changed. It should also be noted that CS was implicit in its mission. So, although it can be judged for not delivering enough support to the commercial sector, it largely achieved its goal of saving jobs and businesses.

An analysis of the UK and Scottish approaches to the pandemic highlights several different directions taken. The Scottish government offered additional assistance to freelance workers across the arts sector who did not qualify for support through the furlough scheme or the SEISS. The Creative Scotland Bridging Bursary Fund offered immediate support to those who had fallen through the cracks. Opening on the 27th of March 2020, applicants could apply for a one-off payment from £500 to £2500. Initially, the budget was £2 million; however, the SG eventually doubled the contribution to £4 million due to demand. The funds were distributed over two rounds, with £871,427 paid out to individuals involved in music covering all local authorities nationwide (Bridging Bursary, 2020).

Additionally, whereas the UK government opted to protect the "crown jewels", the SG made a concerted effort to interact with the culture sector to identify the most at-risk areas. Grassroots venues were recognised as in imminent danger of closure and received funds to aid their survival.

The SG's actions prove that they understood the nuances of cultural work by targeting specific areas of the workforce that the CJRS and SEISS neglected. In essence, the SG applied what de Peuter and Cohen termed "policy from below" (2015, p310). In doing so, the voices of the cultural workforce in Scotland were heard, and meaningful change was implemented. In this sense, the SG can be praised for its attempt to support those who otherwise would have remained disenfranchised.

Whilst this section has claimed that fiscal decisions made by CS were not always correct, it should be noted that SG's injection of funds was the most significant investment that commercial music in Scotland has ever experienced.



## The Approach of Small European Nations to the Pandemic

The previous section investigated Scotland's response to the pandemic; however, it is also useful to briefly compare that to the other nations in the UK, followed by a snapshot of additional small—to medium-sized European countries. Context is crucial when examining government legislation. The response of other countries can not be directly compared as several aspects require analysis. For example, the amount of debt a country has, its annual GDP, or its previous track record of funding cultural activities must be considered.

The ACE led initial investments into arts and culture across the UK. However, Northern Ireland delivered the highest level of early economic support, with £7.02 per capita. In comparison, England provided £2.84, Scotland provided £2.38, and Wales provided £2.23. Once the cultural recovery fund was distributed, the scales shifted, and England became the highest investor per capita at £25.37, £18.71 in Wales, £18.33 in Northern Ireland and £17.75 in Scotland (Wright, 2020). Alongside the discrepancy in economic support is how each nation administered those funds. Northern Ireland and Scotland targeted individual artists whilst England and Wales primarily supported cultural organisations and subsidised venue recovery (ibid).

By expanding the analysis to Europe, research from Betzler et al. (2020) demonstrates how the governments of the Netherlands, Slovenia, Portugal, Switzerland, and the Czech Republic responded to the pandemic with economic cultural packages.

- Scotland - 5m people - £97m
- Holland - 17.7m people - £300 million
- Switzerland - 8.7m people - 260 m euros
- Czech Republic - 10.6m people - 41m euros
- Portugal - 10m people - 1.4 million euros
- Slovenia - 2.1m people - no cash until third round of payments

In comparison, the Scottish government matched or exceeded those countries' cash injection of support. Only Switzerland provided more economic help than Scotland to the cultural sector, while Slovenia offered no support in the short term.

It is worth noting that all five countries analysed by Betzler et al. followed a similar pattern of help for their respective citizens as Scotland. Payment deferrals for tax, fiscal support for employers, and fiscal support for the self-employed were utilised to support the general public, which in many cases also aided the cultural sector.

## Culture during a Pandemic

Although the pandemic negatively impacted the nation from a socio-economic perspective, it also reinforced the importance of cultural activities to society. The population found themselves with an abundance of free time due to stay-at-home orders, which many spent on cultural activities. Whilst some choose to learn a new skill, such as playing a musical instrument, others utilised cultural content as a support system (Edwards, 2022).

The hiatus of all in-person socio-cultural activities did not stop content delivery. On the contrary, consumption increased in what Radermecker calls a "paradoxical situation" (2020, p1). With the general public staying home due to lockdown restrictions, they turned to digital means of accessing culture. However, instead of seeking out new and alternative types of cultural activity, Roberts (2020) summarised that individuals spent more time at home doing what they had before the pandemic. Around 80% of all music consumed in the UK was from a streaming platform, which experienced an 8.2% increase in 2020 (Topham, 2021). The data supports additional research from Bakhshi et al., who contend that music consumption increased, especially among younger adults (2021). Although music consumption initially decreased, it recovered to join video streaming and gaming in what Mulligan calls the "covid bounce" (2021). The increased consumption habits align with Frith's argument that culture could be critical to helping society escape the mundane of everyday life, which was especially pertinent during the initial lockdown period (1996, p20).

The analysis reveals a disconnect from the government in its cultural policy decisions. In line with the 2008 economic crisis, the pandemic affected the cultural sector's three revenue sources: income from sales, private donations, and government funding. What is apparent is how audiences used commercial music as a support method to cope with conditions while the sector faced market failure. In this sense, governments are overlooking the social and cultural importance of commercial music activities and narrowing in on their economic capabilities.

## Medium-term impacts of Covid-19 on the Music Industries in Scotland

The easing of lockdown restrictions in Scotland began on the 24th of January 2022, with indoor and outdoor shows permitted to proceed and social distancing rules cancelled. However, the live sector had been damaged by job losses, a drain of professionals and the threat of further cancellations. Although the live sector was functioning again, the impact of Brexit and the cost-of-living crisis affected Scotland's music industries, further complicating the recovery from Covid-19.

It was unclear whether the public would feel safe enough to attend live shows, with the Omicron variant responsible for around 25% of gig cancellations in the first three months of 2022. Live agent Lisa Whytock noted that several small shows were slow to sell; however, "when tickets do sell, they're selling the last week for a lot of the shows, which is terrifying for everyone and leads to cancellations" (2022). However, ticketing data from DF Concerts suggests that the loss of events drove up demand, with over one million tickets sold between June and August of 2022 (Garner, 2022). The contrast in ticket sales is likely due to the demographic, with DF promoting commercial mainstream artists.

With so many gigs cancelled and rebooked, the sector has witnessed a shortage of specialised crew. Although this was first experienced during the pandemic, the impact of Brexit only exacerbated the issue. UK Music notes "skills shortages in some areas, for example, freelance crew and musicians, and a lack of access to a European workforce to plug the gaps for UK-based events" (Edwards, 2022, p11). With the lack of crew came a rise in operating costs, affecting every live music area. However, whilst costs have risen, there has been a notable stagnation of

income for performers. It was noted that this was "largely attributable to the pandemic and Brexit" (UK Music, 2023)

## Retrospective Economic Analysis

Economic impact data regarding the UK music industries is scarce when investigating the impact of the pandemic, particularly for Scotland. UK Music's 2021 annual report (Edwards, 2021) offers a partial snapshot across some sectors. They estimate that the UK lost 46% of the overall GVA, declining from £5.8 billion in 2019 to £3.1 billion in 2020. Live music is emphasised as having experienced a 90% drop in revenue, and music creators are suggested to have lost around 56% of their total revenues, too. There is a lack of topline data for the recording and publishing sectors; however, UK Music reveals a 15% growth in streaming and a 31% growth in the sale of vinyl. Whilst UK Music does not divulge the total economic change from 2019 to 2020, the BPI handbook discloses that recorded music experienced a 3% increase in 2020, generating around £1 billion (Green, 2021). Based on various UK Music reports, Osbourne (2023) estimates that live music and music creators accounted for 96.3% of the total decline in GVA. This means that recorded music, music publishing, music representatives, music merchandise, and music retail were only responsible for the remaining 3.7% decline.

Although UK Music does not offer a comprehensive analysis of sectors, recent research from Todd et al. (2022) provides a snapshot of Wales for 2020 compared to 2019. Chapter two of this thesis featured a comparison of both the Scottish and Welsh industries from several perspectives; therefore, it is more than reasonable to assume that the economic impact of the pandemic will have been similar, too. It is worth noting that the Welsh figures are based on GVA, whereas this thesis offers income estimations. Even so, the data remains valuable as it is indicative of the overall impact.

The sectors analysed by Todd et al. (2022) are similar to those within this thesis, with the only exception coming from recorded music, which was combined with music publishing.

- Music Creators: 22%
- Live Music: 90%
- Recorded music and music publishing: +3%
- Music Retail: 64%
- Music Representatives: 22%

Total GVA lost in 2020: 55%

The data from both authors indicate that the impact experienced by the live music sector across the UK is similar and, therefore, should be comparable in Scotland. The only discrepancy I would highlight is that Scotland has more mainstream commercial artists performing in the UK, Europe, and globally; therefore, the Welsh estimation of a 22% decline may be inaccurate, with Scottish music creators being closer to the UK music figure of 56%.

## Conclusion

This chapter has argued that although the government's measures to curb the spread of the virus had adverse social, cultural, and economic consequences, the pandemic only aided in revealing preexisting structural flaws within the Scottish music industries.

Although the cultural sector has been described as in crisis due to the pandemic, it was revealed that cultural workers have been on the brink of a crisis for far longer. The outbreak has highlighted the precarious nature of working in the music industries and the existing inequalities, which are an ongoing concern. However, cultural workers and businesses showed resilience during the pandemic by attempting to alter their business models.

Amidst the disruption, culture stood out as a way to connect people during difficult times. The most interesting aspect of the pandemic remains the public use of culture to cope with lockdown measures against the government's recurring adoption of instrumental policies.

It is also evident that neither the Scottish Government nor Westminster understood the creative or cultural sectors before the pandemic. As a result, it took far longer to deliver support. Overall, it appears CS performed fairly well with the delivery of the CRF, although the distribution of funds to organisations that were already in receipt of core CS funding was flagged as poor decision-making.

The pandemic has been an opportunity to reshape cultural policy in Scotland and engage with the arts in a different, more meaningful way in the long term. However, it has been announced recently that the SG is cutting yearly funding to CS by £6 million.

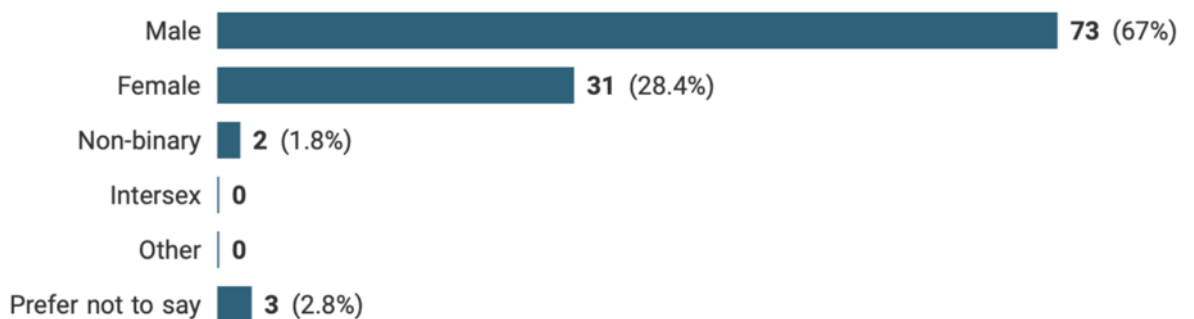
## Chapter Eight: Findings and Discussion

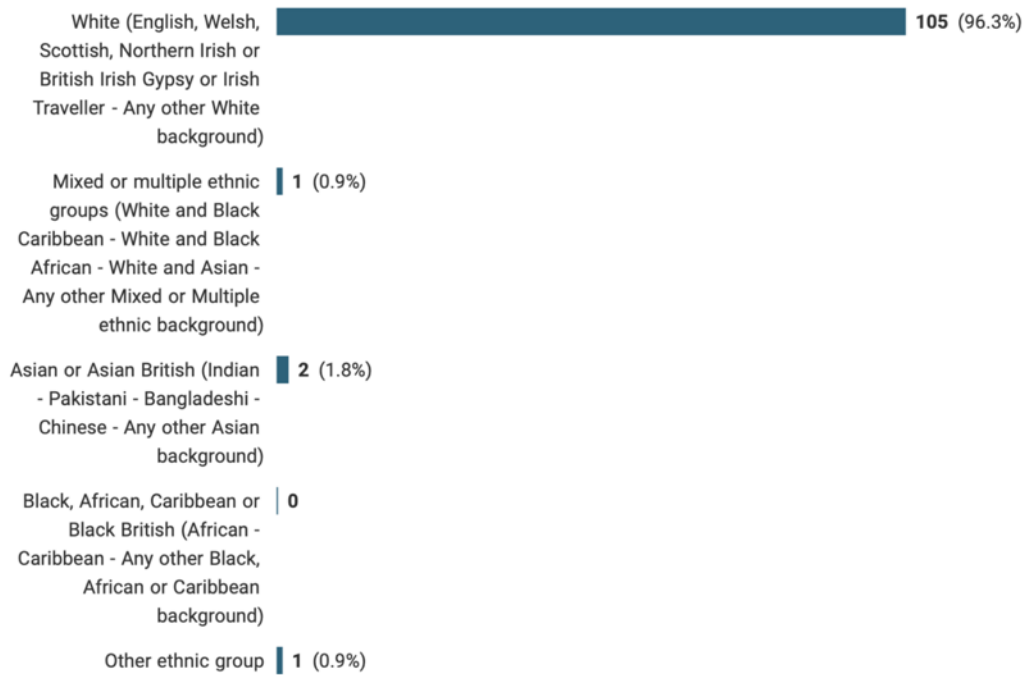
The semi-final chapter of this thesis will deliver the research findings collected from a survey and semi-structured interviews. The participants work in intermediary roles or as music creators in the Scottish music industries. Therefore, the data in sections 8.1 and 8.2 directly expresses the opinions and concerns of those operating within the music sector. Section 8.3 will then discuss the two data sets alongside the findings from Chapter Five and discuss their findings to draw out and identify key themes.

### Survey Findings

#### Basic Participant Information

The survey received 109 completed responses. The number of male respondents (67%) is more than double that of females (28.4%), whilst two identify as non-binary and three did not reveal their gender identity. Additionally, 96% of those who took part are of white heritage, whilst only 0.9% are from mixed or multiple ethnic groups, 1.8% are from Asian or Asian British, and 0.9% identify as another ethnic group.



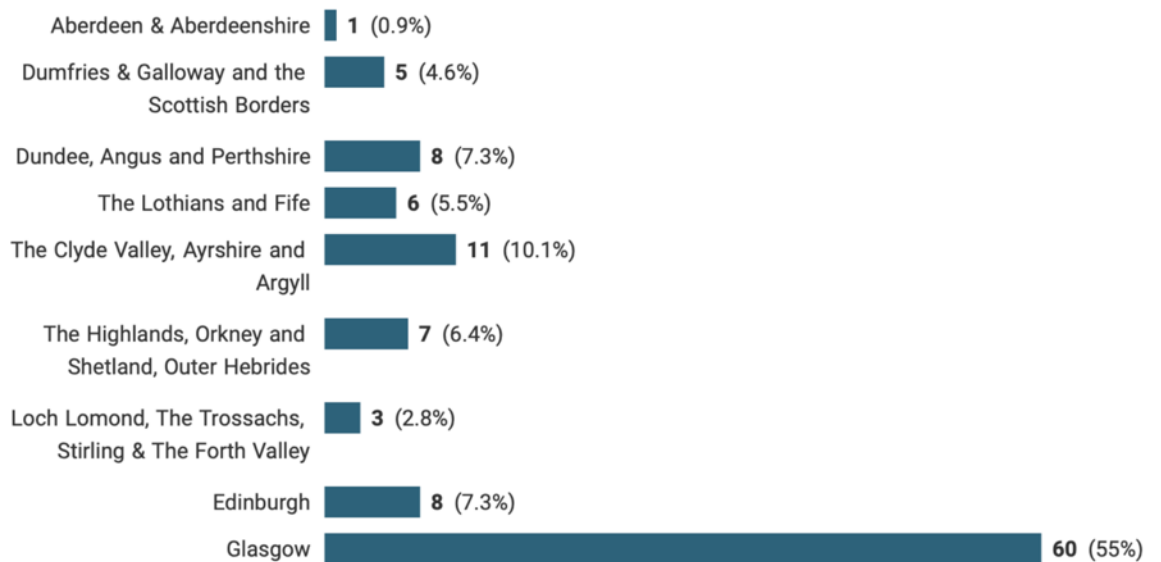


Of the 109 participants, 50% revealed that they had experienced discrimination. The two most prominent reasons were age and gender; however, sexuality and ethnicity were also noted.



Geographically, the highest number of respondents came from Glasgow (55%), followed by The Clyde Valley, Ayrshire and Argyll (10.1%), then both Dundee, Angus and Perthshire and Edinburgh (7.3%).

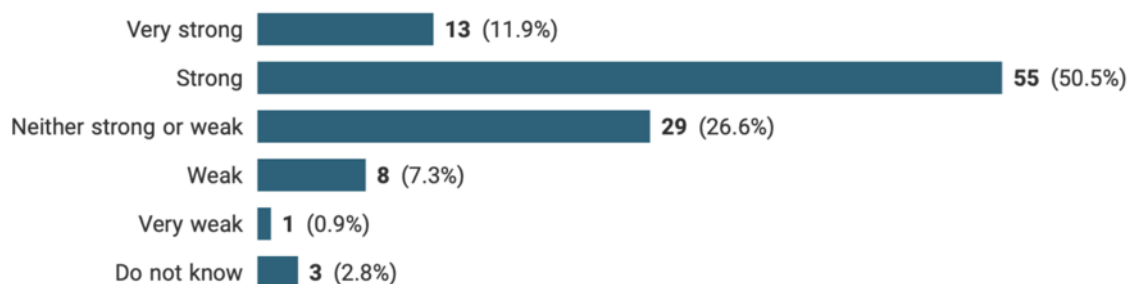




Although the thesis argues there are seven music sectors in Scotland, the survey was only interested in five of those. The Media and Funding and Development were excluded from the survey as they operate on the periphery of the music sector. However, the remaining five sectors were represented, with music creators making up 59.6% of respondents.

## Overview of the Music Sector in Scotland

As the pandemic was a temporal event, it was imperative to understand how the music sector functioned pre-pandemic so as not to conflate any pre-existing issues with pandemic ones. Therefore, respondents were asked to report on how strong they felt the Scottish music sector was before the pandemic, with 62.4% believing it was strong or very strong, while 8.2% thought it was weak or very weak.



The individuals who indicated the industry was in good health provided several reasons:

The strength of the live scene is regarded as one of the most vital elements of the music industries, with promoters receiving significant praise.
The range of festivals on offer around the country covers a diverse range of genres.
The number of artists representing Scotland signed to major labels was used as an example of the strength of the talent pool.
Several respondents believed that although Scotland is a small country, it often punches above its weight in terms of creative output.
The quality of recorded music, albeit released independently, highlighted the talents of artists.
A vibrant scene was visible for new and emerging artists and musicians.
The industry's strength was linked to those working in the sector and the network of available help.
Music makes a massive contribution to Scotland's cultural vibrancy.

Alternatively, those who felt the sector was lacking and reported it as weak also provided multiple reasons:

The low income of music creators received criticism, with many not receiving a liveable wage.
There is a lack of government and local council support to improve local music scenes and prevent the closure of music venues. Industry funding received a high level of criticism, especially concerning music creators, the diversity of funding, and the overall sector's strengthening.
Although live music received praise, the need for a coherent touring infrastructure, particularly in rural areas, was highlighted as a concern.
The Scottish music industries are considered Glasgow-centric.
The lack of rehearsal and performance space, especially for amateur choirs and orchestras, was disappointing.
The infrastructure available in Scotland to develop artists and genres was highlighted as problematic. Specific attention was given to developing jazz and blues.
An enduring issue within the research was the need for an export office to promote Scottish music abroad.
Scotland's music sector needs to catch up in many respects compared to countries of similar size and demographics.

The live sector received relatively widespread praise. Music venues were rated strong or very strong by 69.9% of respondents, whilst music festivals were slightly less at 50.4%; however, the touring infrastructure was described as weak or very weak by 42.4% of respondents, whilst only 23.5% felt it was strong or very strong. Although not part of the commercial sphere, the amateur sector received fairly positive feedback, with 49.5% of respondents believing it to be strong or very strong.

The recording sector received mixed feedback. Recording studios received the most praise, with 61.7% indicating that they are strong or very strong, whilst music distribution is fairly split as neither strong nor weak. Respondents felt that record labels are the most powerless element of recorded music in Scotland, with 45.7% reporting that they are weak or very weak. In contrast, only 20% consider them strong or very strong.

Government funding received very little praise, with only 21.7% believing it to be strong or very strong, whereas 52.8% viewed it as weak or very weak. Trade bodies are deemed neither strong nor weak by 48.5%, although 34% of respondents believe them to be weak or very weak. On a positive note, music education is considered to be strong or very strong by 50.5% of individuals, whilst weak or very weak was 26.2%. Additionally, community music projects received a 51.9% response as strong or very strong, whereas only 16.1% believed it to be weak or very weak.

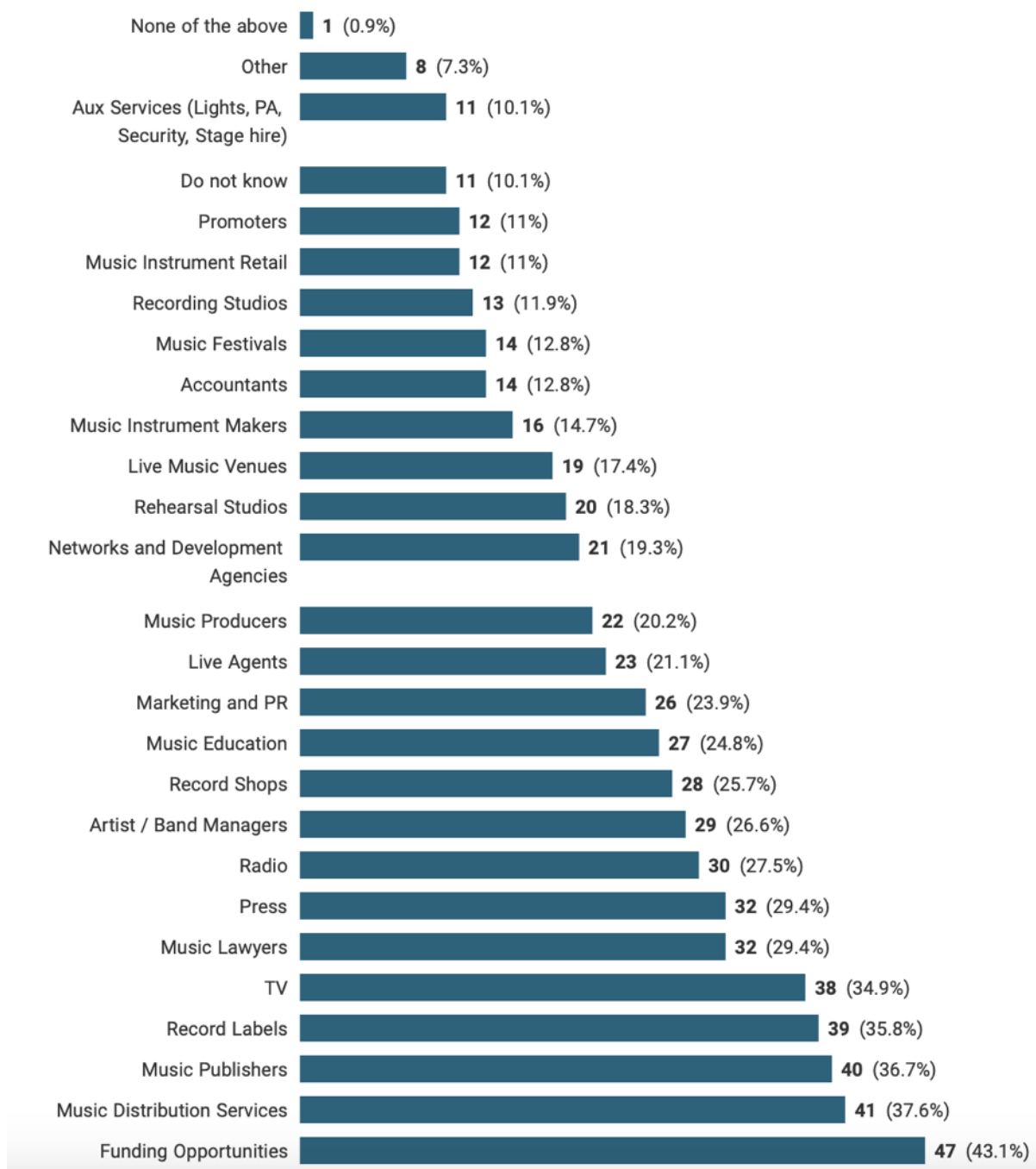
Overall, music representatives received mixed to negative feedback. Most respondents believe music managers to be neither weak nor strong; however, 40.8% believe them to be weak or very weak, with only 10.6% considering them to be strong or very strong. Live agents did not receive any votes for very strong, instead obtaining 49.5% for weak or very weak. Additionally, publishers did not receive any feedback for very strong, with only 6.9% believing them to be strong, whilst 35.1% consider them to be weak or very weak.

The support from media outlets in Scotland is relatively negative. Only 17.8% believe it to be strong, whilst 48.6% consider it to be weak or very weak.

## Gaps in Provision

Respondents have highlighted several areas that they deem to be under-represented. The findings match those of the previous section, with a number of additional areas emphasised. First, 43% of those who completed the survey would like to see more funding for music creators and businesses. Music publishers, record companies and distribution services have been flagged as areas where improvement in the services on offer or the provision of services could be enhanced. Additionally, television, radio and press are problem areas with a need for more TV opportunities raised as problematic.

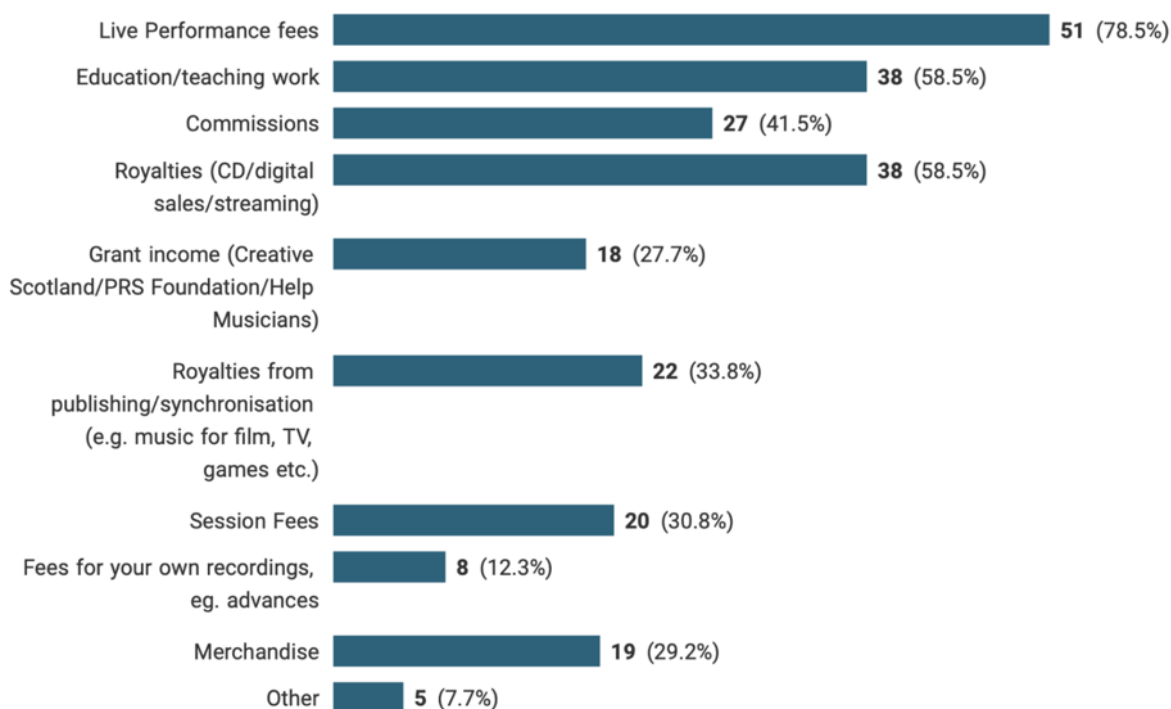
*Are there any stakeholders within the Scottish music industries which you feel are underrepresented leaving a gap in provision?*



## Music Creators

The survey received 65 responses from music creators. Of those, the highest number were musicians (28), followed by artists (19). The most common genre was classical/chamber, followed by traditional Scottish music, rock, indie, pop and folk; however, jazz, hip-hop and electronic music are represented. Early years music tuition whilst attending school was confirmed by 44 music creators, with 18 receiving additional private tuition.

A number of revenue streams are available to music creators both directly and indirectly involved with music making.



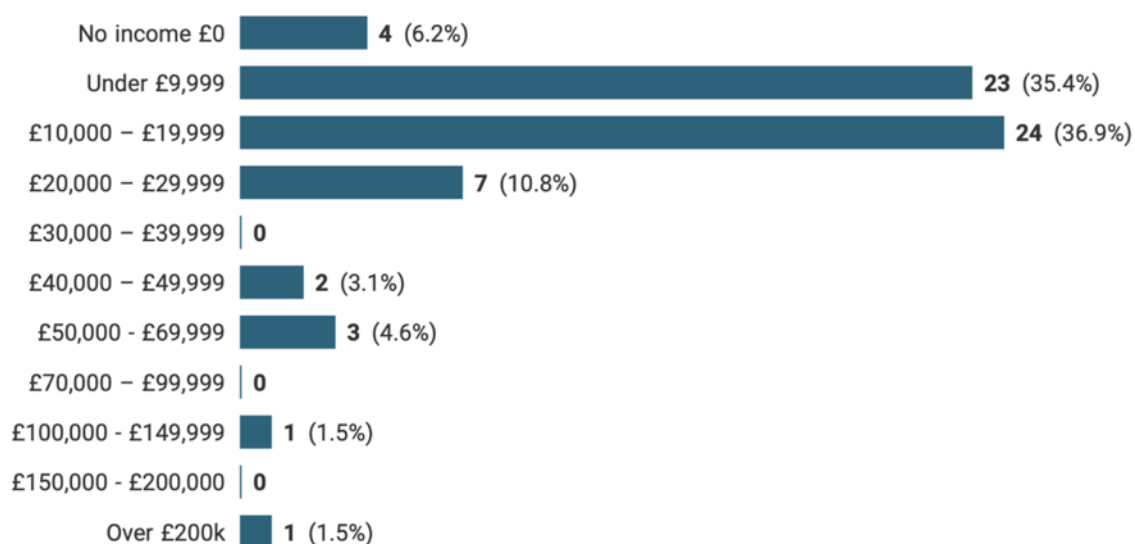
Live performance fees were reported by 78.4%, indicating it is the primary source of income. Teaching work and the royalties from selling CDs, digital sales and streaming services were noted by 58.4%, with commissions reported by 41.5%. Notably, 33.8% acknowledged that some or all of their income is generated from a funding source such as Creative Scotland, PRS Foundation or a similar type of funder.

Over two-thirds of respondents (46) define their music activities as professional, with 26 individuals revealing that music is their primary source of income. The other 20 are paid for music and other activities, too. Of the remaining nineteen, seventeen identify as semi-professional, while two are amateurs who receive no money for music. Although 46 individuals identify as professionals, only 27 spend more than 30 hours weekly on music-related activities.

Almost everyone reported that their income came from within Scotland. However, revenues were not limited to Scotland alone.

- 57 reported income from Scotland (87.6%)
- 44 reported income from the UK (67.6%)
- 31 reported income from Europe (47.6%)
- 28 reported income from the rest of the world (43%)

The revenue generated annually by music activities was relatively low across the 65 respondents.



78.5% of respondents reported earning less than £20,000 in 2018. Only 10.7% earned over £30,000, with 3% earning over £100,000. Only 31.3% of individuals reported earning enough to survive each month. Whilst 66.2% of creators noted earning liveable revenues, 37.5% were not earning enough.

Statement	% of respondents
<i>I am earning more revenue than I spend</i>	31.3
<i>I am earning as much revenue as I need</i>	31.3
<i>I am not earning enough revenue</i>	37.5%

Funding is a staple of support for music creators in Scotland, with 53.8% confirming they have received a subsidy at some point in their careers.

Respondents identified several sources of help:

- Creative Scotland
- Local Councils
- PRS Foundation
- Hope Scott Trust
- Help Musicians
- Tasgadh
- Nevis Ensemble
- William Grant Foundation
- Arngee Ltd
- Private investment

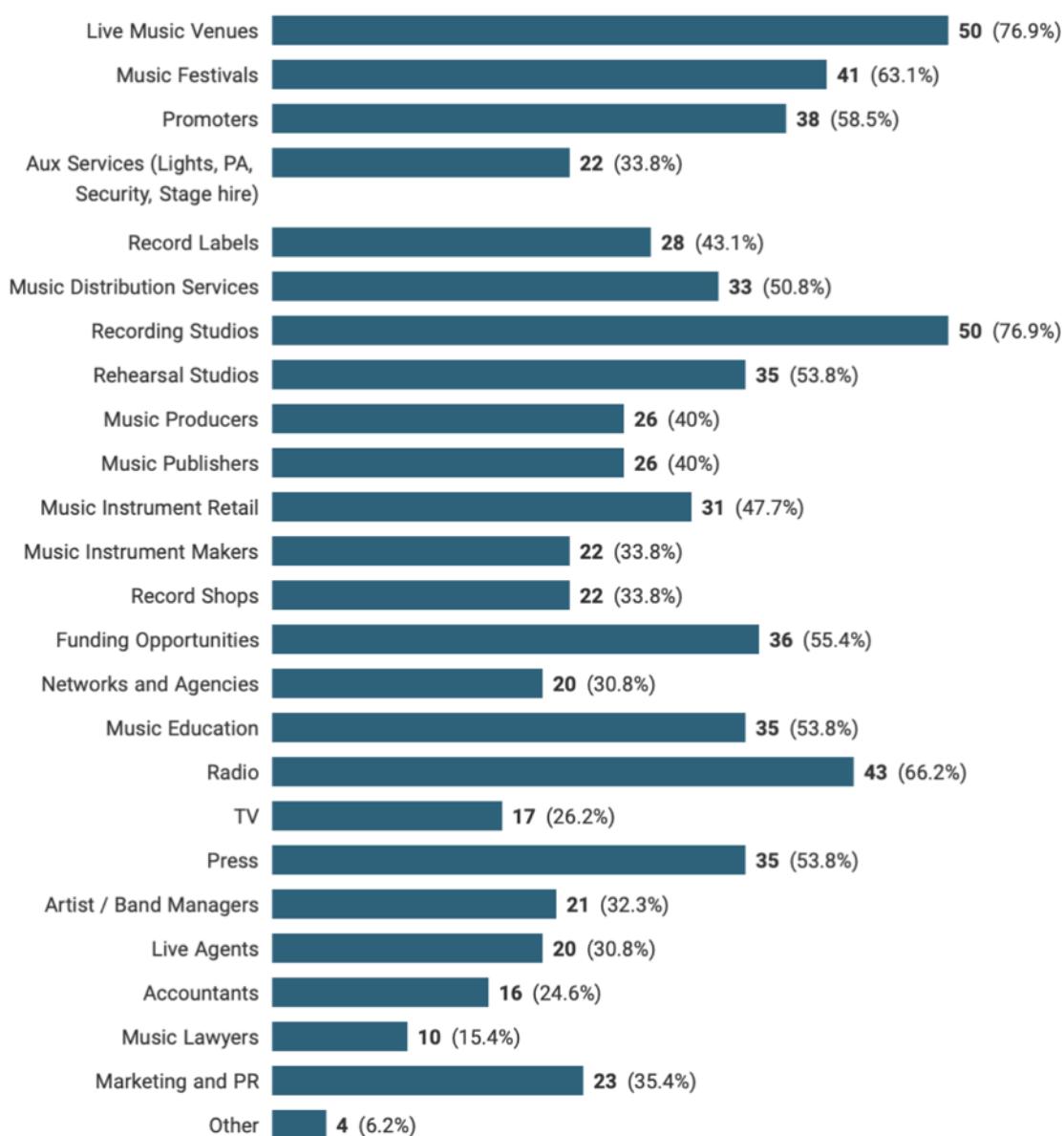
Most music creators look after their own careers; however, several respondents disclosed that they have representation from industry-specific intermediaries. It is not clear whether these representatives are based in Scotland:

- Manager (7.7%)
- Booking agent (12.8%)
- Record label (7.7%)
- Music publisher (11.5)

The survey delivered a list of intermediaries whom music creators utilised. In line with previous data, music venues and recording studios were utilised most by 50 participants. Radio was high up on the list with 43 respondents, whilst music festivals were used by 41. Music lawyers, accountants and TV reps were the least utilised.



## Which music industry stakeholders do you interact with?



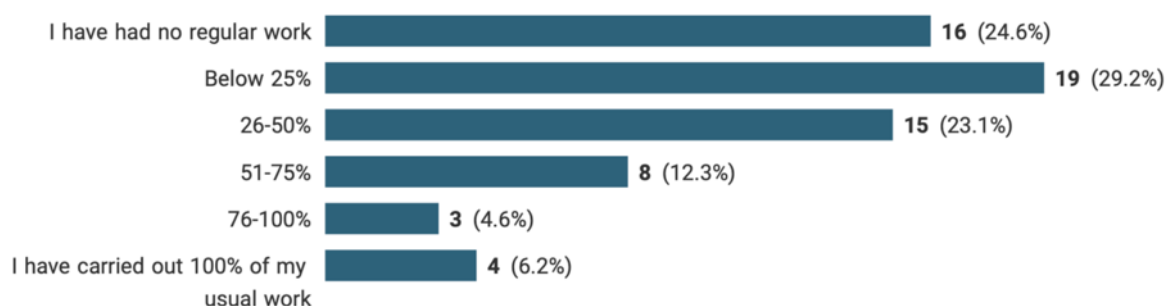
## Impact of Covid-19 on Music Creators

According to data, revenue for music creators was significantly impacted due to lockdown restrictions, with 89.2% of individuals noting a decrease in earnings.

*Since the pandemic began, has your income from music activities ...*



Although revenues were lost, the level of income varies. Almost 25% reveal that they have had no regular work. Only four respondents carried on with full work commitments.



Lockdown restrictions affected the ability of music creators to produce music, with 72.3% indicating difficulties. Feedback from respondents reveals the closure of live music venues and lockdown restrictions as the primary reason; however, some expanded on their explanations. A number of responses suggest that poor mental health contributed to the lack of music creation. The leading causes are isolation, absence of motivation and anxiety over income. Access to recording studios and rehearsal spaces was an additional hardship for music creators as these spaces are where they can be creative.

It is evident that the online video conference tool Zoom was utilised to help group music-making; however, one respondent highlighted that online sessions could have been more effective. Additionally, although all live in-person gigs were cancelled, performers pivoted to online delivery, which was described as four times the effort for one-quarter of the result. An additional obstacle was childcare. With lockdown protocols, children had to stay home with their parents, making work increasingly challenging. Notably, both mothers and fathers raised the issue.

Although Covid-19 relief funds were available, only 29 respondents applied. Of those who applied, three did not receive any fiscal support. The data suggest a high success rate for music creators at around 90%. Just under half of music creators took on additional employment outside the music industries.

### Music Intermediaries

The reply rate was far lower for intermediaries than that for music creators. However, the data collected is still relevant.

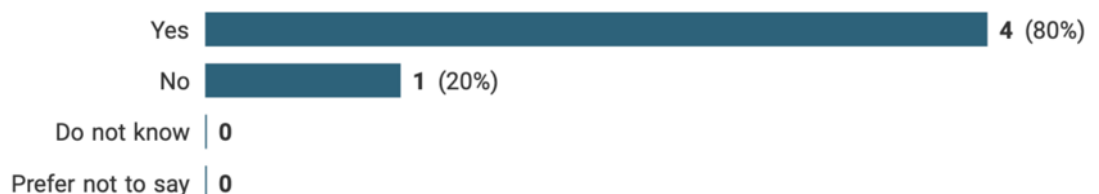
### Live Music

Five music promoters responded to the survey, with four revealing they are self-employed. Three are based in Glasgow, one in Edinburgh and the other in Perth. All respondents operate independently, which is reflected in their income.

*What was your income for 2018?*



The topic of gender splits at festivals was met with a positive reaction, with four of the five promoters believing it was possible. However, secondary ticketing appears less critical, with respondents less decisive on whether it remains a problem.

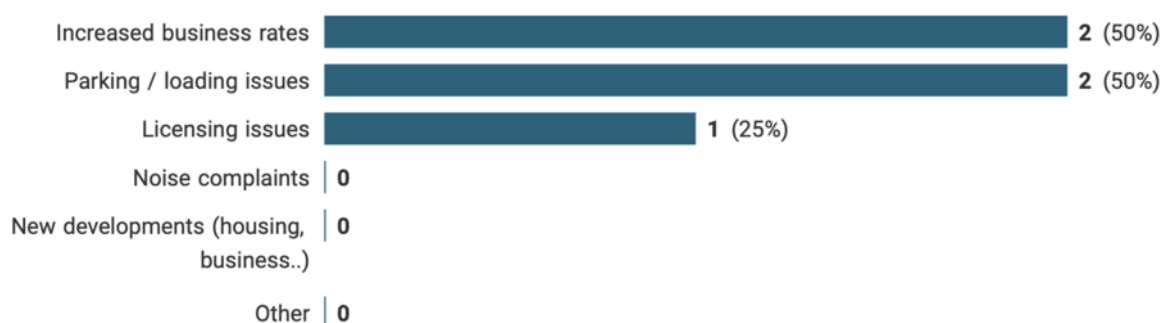


The individual who believes it is a concern explained that it takes money out of the industry and disenfranchises fans while undermining ticket allocation.

Feedback from music venues was broader with its reach. Two responses came from bars/clubs, one from a small music venue and one from a large music venue. One respondent reported less than £50,000 income for 2018, while the rest noted revenues to be between £50k and £99,999. A variety of methods were used to stage gigs in each property:

- In-house promoter
- Independent promoter
- Both in-house and independent promoters

Of the four venues represented, only two confirmed that they provide disabled access, while three confirmed that they provide safe spaces for women or a similar initiative. Finally, music venues were asked what issues they had encountered in the past five years, impacting their business:



The survey received two responses from music festivals: one urban event and one rural. Neither represents popular music, instead representing trad, jazz, classical and blues. Both events have been running for more than 20 years. However, one is run by a single full-time worker generating less than £50,000 a year, whilst the other is a more extensive operation employing between 6-10 full-time and part-time members of staff and generating between £500,000 and £699,999 annually. In both instances, they actively pursue an even gender split in their line-ups.

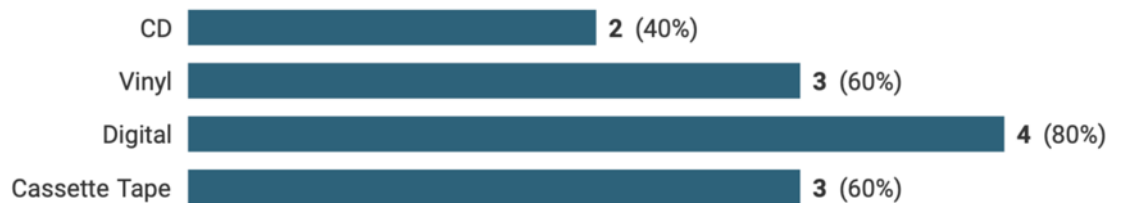
## Recorded Music

The survey received feedback from five record companies covering several genres:

- Rock
- Indie
- Trad
- Pop
- Dance

The age of labels ranged from four years to the longest-running operating for around 35 years, with only one having a full-time member of staff. The income generated by releasing music is relatively low, with three companies reporting less than £10,000 annually in revenues. The top earner generated between £80,000-£99,999; however, only one company generates enough revenue for its artist to earn a liveable wage. None of the businesses has the resources to invest in new acts financially. Whilst digital has become the primary output and revenue source of many labels, all five surveyed still produce and distribute physical albums on numerous platforms:

*On which formats do you release music?*



One recording studio and two record producers provided feedback. The studio operates part-time, earning less than £20k a year. Its primary service is music, but it also records podcasts to generate additional revenue. The studio is used for around 30 hours a week, working with various genres. Whilst home recording equipment has become commonplace, it was not believed to harm their ability to earn revenue.

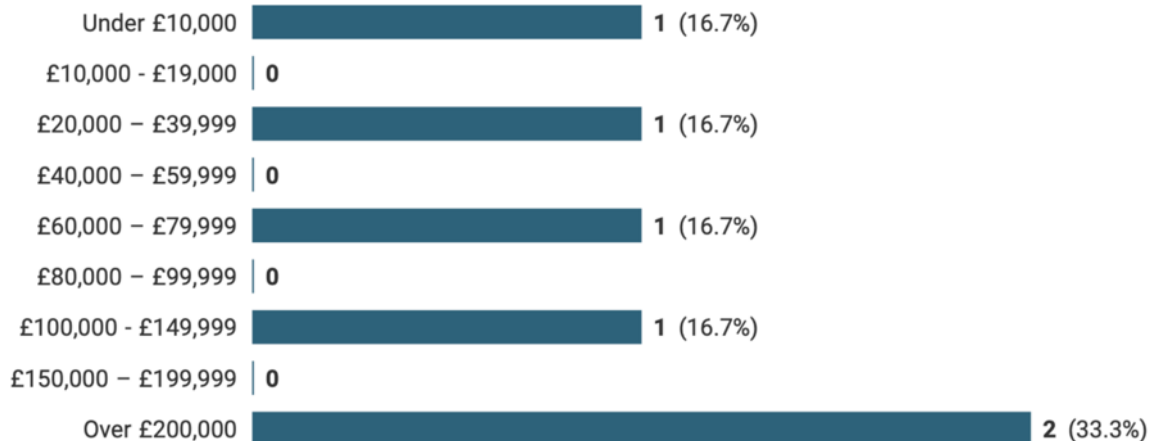
## Music Retail

Two record shops responded to the survey. The Glasgow-based premises have been operating for 25 years with two full-time and one part-time staff member. The Dundee premises are a newer venture that has only traded for six years with one full-time staff member. Although the Glasgow-based business earned between £150K and £199,999, the Dundee store earned less than £20k annually. Both companies admit that their business models would not be possible if they did not sell goods online. Only the Glasgow-based business is involved in Record Store Day while selling additional items such as clothing and merchandise.

## Music Representatives

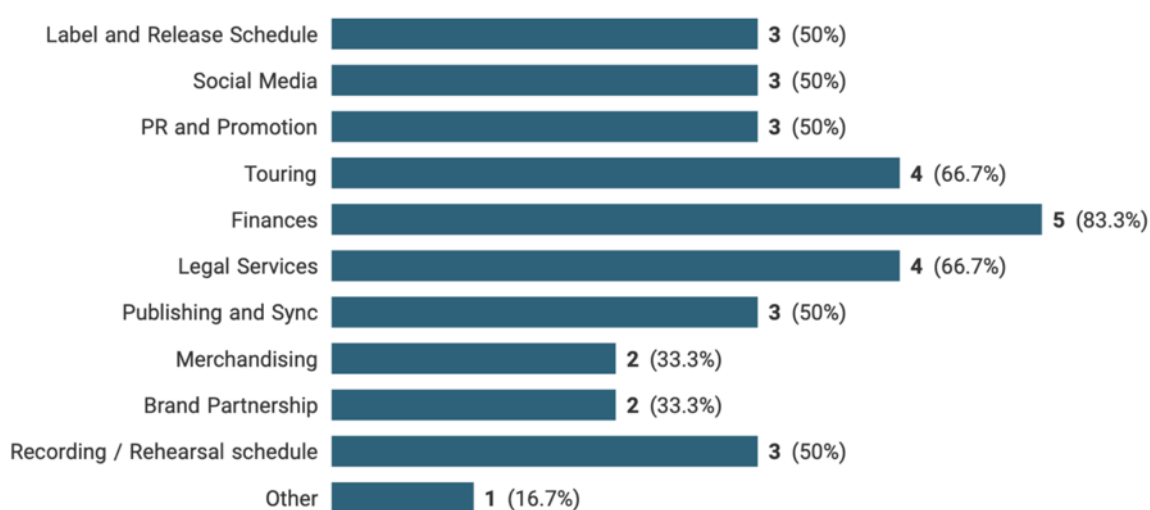
Several managers are part of more expansive management agencies with four full-time staff, whilst three managers noted their businesses have one full-time member. Four of the managers also note part-time staff ranging from one to five. Company earnings were highly varied, with one manager noting less than £10,000 a year whilst two managers noted revenues over £200,000.

*What was your company's income for 2018?*



Four managers admitted that they had invested personal funds to develop and progress their artist's careers, whilst five admitted that in addition to music management, they also must support the mental health of those they represent. Qualitative feedback reveals how seriously it is taken in the industry. One manager set up a support network and has assisted their acts during spells in rehab, whilst another manager revealed they had training in mental health first aid after dealing with various "crisis situations". The top responsibility was overseeing their artists' finances, whilst qualitative feedback revealed assistance to support and develop disabled artists.

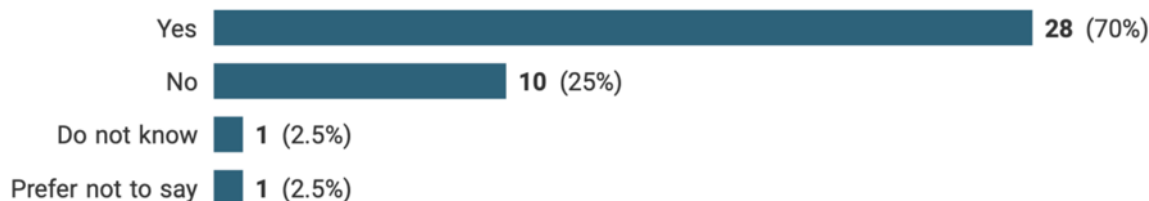
*As a manager, which of the following roles do you carry out?*



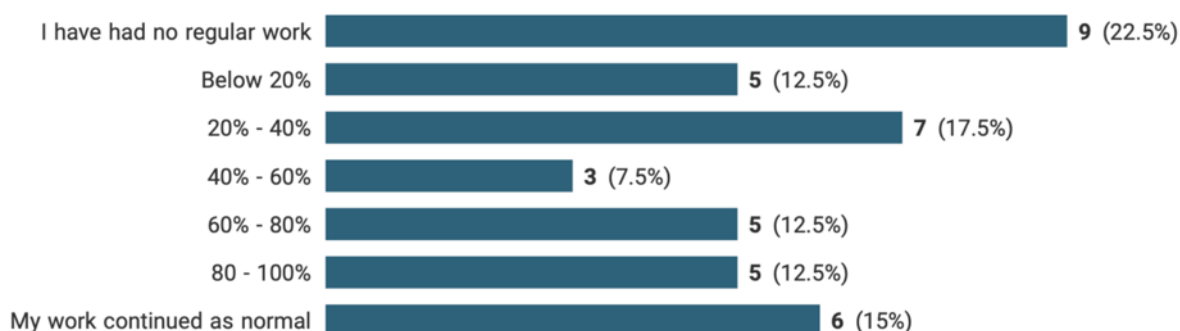
Only one response was received from a live booking agent; however, very few agents operate from Scotland; therefore, it is vital to reveal their findings. They primarily work with artists from the trad, folk and singer-songwriter genres, with their business employing two full-time staff. In 2018, their business generated over £200,000 in revenue.

## Impact of Covid-19 on Scottish Music Businesses

A large majority of intermediaries revealed they had lost revenue due to pandemic-related issues.



Over 50% of individuals could fulfil up to 40% of their usual workload, with 22.5% having no work at all. Only 15% were able to continue working as usual.



Due to lockdown restrictions and financial hardship, just over 30% of individuals took on additional work out with the music sector, whilst around 70% stayed in their music-related roles.

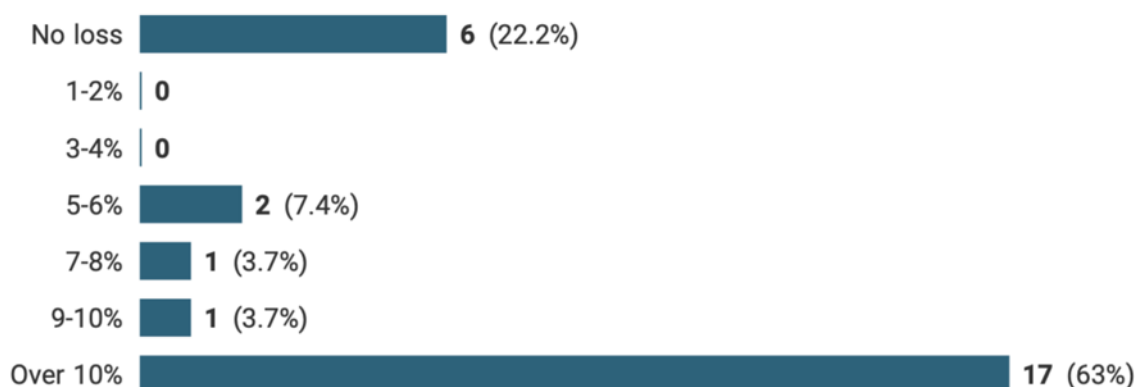
Around a quarter of businesses let go of staff during the pandemic, whilst two-thirds retained their usual workforce. The retention of staff was likely due to the Covid-19 relief funds. Over 50% of businesses applied for fiscal support with various possibilities available. There was a 100% success rate for all businesses from several sources, including:

- Business rates relief
- SEISS
- Event Scotland emergency fund
- Creative Scotland Recovery Fund
- Grassroots Music Stabilisation Fund

As a result of lockdown restrictions, 55% of businesses believe they lost growth opportunities for 2020/21, whilst just under 25% did not know. Those who believed



they had lost growth reported various levels; however, almost two-thirds reported over 10% loss.



Additionally, 100% of freelancers revealed that they had lost earnings and had no regular work since the pandemic began, which resulted in 75% of individuals locating work in other sectors. Only 25% of freelancers applied for Covid-19 relief funds, with fiscal support reported as partial. Overall, freelancers did not feel adequately supported during the pandemic, with 75% of individuals struggling financially.

## Interview Findings

This section presents the main findings from primary qualitative research conducted with key stakeholders across the music industries in Scotland. The data collected is varied as each stakeholder represents their work sector; however, several themes are identifiable and will be presented below.

## Routes to Employment

Entryways to music jobs varied among interviews; however, the two most common routes were from university or post-music careers. One live agent explained, “You become a manager, you become a tour manager, you start recording and mixing bands and everything, and then you just settle on being an agent” (Keenan, 2022). A music publisher highlighted the importance of making connections across the sector, “you just kind of put yourself about and hope that you’ll kind of stumble

across someone who might be able to help you get from A to B” (Montgomery, 2022). Once individuals are in employment, they often pursue additional work to generate extra income (Rodgers, 2022). Keenan acknowledges that working in music is revered, which is why so many people want to enter the workforce; however, that then causes “a lot of pressure to thrive” (Keenan, 2022)

## Music Education in Scotland

“I think music education has made a profound impact on the Scottish music scene and continues to do so” (Scott, 2022).

Music education has not featured highly in previous chapters; however, its importance across all ages was discussed in multiple interviews. Gill Maxwell discussed the importance of access to music from a young age to introduce children to the prospect of a music career, “I was keen to start at 14 because I think people get missed if they leave it too late. So I thought, you know, kids are making choices at 13 and 14 about what exams they are gonna take, and music is never high up there unless their parents are able to pay for tuition” (2022). However, she admits, “it’s not just about stats and feeding into the industry; it’s about well-being, it’s about taking part, it’s about meeting kids their own age. Playing in bands, nothing needs to come of it economically, but when it does, great” (ibid). The impact of music projects for young kids was revealed by Maxwell, who identified Lewis Capaldi as one of the first musicians to use their services, whilst a host of others are “earning full-time money now as musicians that have started off on hit the road” (ibid, 2022)

The fèisean movement was highlighted as an excellent tool for kids to learn Traditional music, with one musician explaining, “There are very few people I think you’ll find in the Scottish music scene that have not come through the feis movement” (Napier, 2021).

At the university level, David Scott believes the emergence of commercial music courses across Scotland “legitimises the music industry” (2022) as it provides access routes into the sector and the skills required to enter several creative roles. Schlesinger is optimistic about the role of music degrees in university, but she is

critical of the work opportunities available in Scotland, explaining, “If you think about graduating, where are the jobs? There’s not that many” (Schlesinger, 2022).

## The Importance of Music Creators

The data reveals that most intermediaries were positive of those making music in Scotland and felt responsible for nurturing and growing that talent as it could positively impact the sector. One interviewee revealed that she thought the “talent pools are probably the strongest part, and you know, not just focusing on Glasgow but up and down the country across the islands” (Montgomery, 2022). Industry veteran and long-term educator David Scott was far more direct in his assessment of music creators and their importance to the sector, explaining that “there is no music industry without songs” (Scott, 2022).

However, there was a high level of sympathy for new musicians at the beginning of their careers with remuneration an ongoing topic for both musicians and intermediaries. One manager explained that the payment structure of running an artist’s business means that “the artist is the last person to get paid” (Interview 1, 2021). In some cases, this would mean that they would not get paid at all and when they did, it was often dependent on the sale of merchandise.

The motivations of music creators were identifiably split between the art and commerce divide. Whilst no one was seeking to become a megastar, there were indications that revenue was a primary motivation. C Duncan was the most explicit, explaining that “making music is my big interest” (2022). However, he follows a traditional industry path and is signed to a prestigious indie label in England. Although revenue is necessary, there were other reasons for music-making. Instead, he explained, “I do it because I love it, and I feel I need to” (ibid, 2022). The remaining music creators were far more forthright in their attempts to generate revenue from their music. Malka and Findlay Napier are independent artists who exhibited signs of entrepreneurialism whilst utilising music education as an additional form of revenue.

## Sectoral Challenges within the Scottish Music Industries

The lack of robust services across a number of sectors is a clear challenge for the Scottish music industries. However, a music manager accepts that having every service based within Scotland may not be a good solution as it “negates the realities of globalism” (Interview 1, 2021). However, other stakeholders highlighted the need to grow and develop the infrastructure, with artist Malka explaining why she joined the SMIA advisory board, “I didn’t think there was enough infrastructure, and I’m lecturing, so I’m conscious of my students for career prospects” (Schlesinger, 2022). Publisher Susan Montgomery revealed that she “would love to see more publishers in Scotland” (2022) as 23rd Precinct Music is inundated with requests for publishing deals; however, the business is a micro-enterprise and does not have the time or resources to look after more artists.

The lack of infrastructure, in many cases, leads to economic value leaving the Scottish sector. Music venue owner Nick Stewart explained that whilst music creators do not necessarily need to relocate anymore to achieve success, “they are almost definitely working with companies which are based outside of Scotland, meaning that the UK (English) sector benefits from Scottish activity. Stewart concludes, “You’re seeing an extraction of value from Scotland constantly” (Stewart, 2022). Keenan offers a reason for this, though, explaining, “I think it’s just tough because so much of the game is down in London. You know, it’s very much a networking business to get those artists before anyone else” (2022).

### Live Music

Touring and the opportunities to earn revenue from live shows are evident based on data provided in chapter five; however, interviews brought several issues to light, mainly those working within the sector. Agent Colin Keenan explained that “artists do have a good foundation for touring here, but it’s certainly not as developed as it could be” (Keenan, 2022). However, a local promoter in Aberdeen explained that “working outside of Glasgow for a promoter means you’ve got a less crowded market for promoting gigs” (Calder, 2022). However, he contends that it takes time to build relationships with agents outside Scotland who will take a

chance on an independent promoter. Although this thesis has continually promoted the revenue-generating abilities of live music within Scotland, that is only the case for some genres.

A jazz promoter revealed that earning a living in Scotland is challenging, adding, “You have to be really committed to staying” (Rodgers, 2021). She described how many jazz musicians would go to London to study but would never return due to ongoing opportunities. What was once considered popular music has grown to include additional genres, with folk and traditional music moving from the periphery to the mainstream. Agent Lisa Whytock explains, “Elephant Sessions, one of our artists, have just sold the Barrowlands out, and I’ve got the Academy booked, and they’re now working With DF and like major promoters in England, we’ve charted in the Australian download charts, they have an international career” (Whytock, 2022).

The role of GMVs was discussed in detail by venue owner Nick Stewart, the MVT representative in Scotland. Even though GMVs are incubators for new artists, they almost always lose money promoting shows. Stewart explained that grassroots music venues spend 128% of the ticket value on putting on the shows. That is to say that they make a 28% loss” (2022). The revenue which allows the venue to operate comes from club nights and the sale of alcohol.

## Record Labels

The record labels in Scotland are all micro-enterprises; however, their quality was recognised by a publisher who explained, “The record labels here, I think, are super, super strong and I’d like to highlight Olive Grove and Last Night from Glasgow” (Montgomery, 2022). However, this may not always have been the case, as Olive Grove Records co-founder Lloyd Meredith explained that the initial idea to start the label came from a position of frustration with the lack of support for musicians as there “wasn’t something out there supporting them to put out their music and get it more widely heard (Meredith, 2022). A lack of financial support for record labels is an ongoing concern, with Meredith explaining that he must fund all the releases independently.

“I don’t think it’s sustainable in the long term unless you’ve got people who are passionate about that. Otherwise, you’ll just end up with biggish indie labels, and just the small people who try to promote local bands getting overline will disappear because we can’t do it anymore” (ibid, 2022)

## Music Management

An interesting point that music managers raised was the comparison of managing an artist to running a business. Although this is an accepted part of the job, recent changes in the global music industries due to technological changes and the introduction of new revenue streams mean that the role of music managers has expanded, with one manager noting, “the workload is intense” (Scougal, 2021). The number of music managers in Scotland appears to have increased, with Whytock noting that no managers were available for trad and folk artists in the early days, so her agency had to do everything for their artists, “Set up the distribution deals, sort out licencing deals, get a press agent for them, set up all the sub-agents around the world, help them with their visa applications, and do their funding applications for them (Whytock, 2022). Whilst this has improved, the introduction of the internet has enabled musicians to take on many of the responsibilities often performed by managers. Montgomery believes it is crucial to have an understanding of all the processes involved; however, she asserts that trying to have that understanding of every aspect of the business and being a performer as well it’s nearly impossible” (Montgomery, 2022)

## Fiscal Support for Music

Overall, CS received reasonably positive feedback from interviews. One manager explained, “I think Scotland is actually very well served through Creative Scotland and local authorities because they’re under immense pressure for a whole heap of stuff and they sustain music, funding and music activity” (Interview 1, 2021). Jazz promoter Gill Rodgers indicated that annual CS funding sustains the Glasgow Jazz Festival after Glasgow City Council removed all funding, which emphasises the previous manager’s points. Artist Findlay Napier illustrated how helpful the support had been from CS over the years in order to pursue a music career.

However, he believes that the measurable outcomes of funding are short-sighted, explaining that “funding went in about five years ago, and the payoff only happened this year” (2021).

The funding structure of CS was frustrating for one music representative who questioned why the industry did not receive structural support but would fund individual tours or albums. She illustrated that CS “won’t fund the infrastructure that those artists need to have a career; it’s just self-perpetuating nonsense because if they fund an album that just sits in someone’s bedroom who doesn’t sell anything, what’s the point in that?” However, she does acknowledge that blaming CS without addressing the ongoing issues at SE would be wrong (Interview 12, 2022). Although she does not address the issues directly, a music manager admitted that “Scottish Enterprise at the moment just don’t see the music industry as a priority because of their parameters, not because somebody sitting there saying, let’s just deliberately forget about the music industry. The parameters they’re working to mean that the kind of money involved, and the growth opportunity is not seen as a priority” (Interview 1, 2021)

A manager stressed the difficulty of knowing where to go for funding as the signposting is unclear. At one stage, he wanted to start a record company for his artist and went to CS; however, their remit is artistic creativity. Additionally, he explained that funding is available across the industries but added that “you need to know what you’re looking for and be in the right circles” (Scougall, 2021).

Although CS does not have a commercial music remit, their funding benefits commercial artists indirectly. C Duncan stressed the importance of the SAY award to his career progression, “I think the SAYS got a lot to do with why I still have a fan base in Scotland” (2022). The artist believes that the nomination is why people continually attend his shows.

## Pandemic Impacts

The previous chapter addressed many of the pandemic’s direct impacts. However, what was missing from the literature was the exhaustive nature of working in the music industries in Scotland during that period, with one manager explaining, “Me

and the team I work with have just been trying to keep businesses alive and keep people sustained through whatever route we can find financially to get them through this period. So yeah, I've never worked as full-on and as hard as I have done in the last 18 months (Interview 1, 2021). An Aberdeen-based promoter echoed this sentiment, noting that he was "constantly rescheduling and stuff, but there's obviously no income coming in" (Calder, 2022).

A common theme amongst interviewees was the lack of support for artists during the pandemic. David Scott acknowledged the impressive support packages for venues and promoters and the associated live sector; however, he noted, "where was the support for artists? (2022). Music Publisher 23rd Precinct tried to facilitate revenue for their artists by organising songwriting sessions online and setting up home recording studios. Similarly, artist Malka created a new all-female songwriting collective called Hen Hoose to bring together songwriters to try and provide a revenue stream as touring was not an option. "Everyone was so grateful for the distraction and focus that, actually, I would've almost done it for free (Schlesinger, 2022). The notion of interacting with others creatively was also highlighted by C Duncan, who explained, "You need people to speak to. You need inspiration to come from somewhere" (2022). One manager explained that many of their artists had used savings during the pandemic as they had no incoming revenue. He theorised that the music sector in Scotland would need an injection of cash to restart, explaining that it was crucial "to invest at the front line of artists, in their content, in their music, in their songwriting and recording" (Interview 1, 2021). By doing so, the revenue would trickle down to support additional sectors.

The government support for creative jobs and workers was discussed by C Duncan, who believes that "there was a lack of understanding of what a musician actually is" (2022). Lisa Whytock argued that "the music team and Creative Scotland have been very good" (2022) due to the support offered to freelance workers; however, she was more critical of other agencies, "What are Scottish Enterprise doing? Where is their support for music?" (ibid). Ultimately, she believes the funding structure of SE should revert to the older model when there was a dedicated music department. Nick Stewart agrees about CS, illustrating that "for the most part of Covid, they actually totally nailed it" (2022).



## Long-term Sectoral Improvements

Whilst many stakeholders were optimistic about music in Scotland, they were asked what changes could be implemented to improve the sector. Those interviewed often expressed issues and concerns regarding their areas of work; however, two identifiable themes emerged: the need for a dedicated export office and the need to unite the separate sectors under one banner.

Keenan noted a major absence in the Scottish sector was a dedicated export office, explaining “if you look at The UK export Offices and their events all around the world, you can see how little Scotland is represented” (Keenan, 2022). However, a manager expanded on the requirement to offer a potential framework where the office would be “embedded across different public bodies” (Interview 1, 2021) to offer a range of funding and investment opportunities to help artists trade internationally.

Lisa Whytock illustrated how she developed her own export model. International promoters were travelling to Celtic Connections to identify possible export-ready artists. Whytock then formalised that process and set up Showcase Scotland Expo, a dedicated export office for traditional, folk, acoustic, Gaelic, and Scottish music. Whytock explained, “It has a huge, huge, huge ROI because everybody is signing, and everyone is booking” (2022).

The second transformation identified is the separate sectors coming together to fight for a stronger, unified music economy. Music Publisher Susan Montgomery highlights the lack of unity, explaining that there are “a lot of people doing a lot of great things separately” (Montgomery, 2022). Although the SMIA are tasked with trying to unite the sector, one music representative expressed her doubt, explaining, “As far as I’m concerned, you will never unite the sector behind one organisation” (Interview 2, 2022). She theorises that this is because every sector is pulling to improve its own issues and access more resources without looking at the bigger picture.

## Discussion

The outcomes of this research have provided insight into the structure and operational practices of the music industries in Scotland whilst revealing several strengths and weaknesses. However, caution is required. The interpretation of data is limited as it encompasses a broad spectrum of individuals from extremely diverse sectors and geographical locations, all with mixed needs and demands. The remainder of this chapter will discuss the findings from sections 5.1 and 5.2 and place them in the overall research context.

The findings indicate that Scotland's music industries lack a coherent infrastructure. However, there is a bustling live sector and an abundance of music creators across all genres performing nationally and internationally. The sector requires more robust provisions from several areas, such as record labels and publishers. The lack of such services has led to the outsourcing of business activities. The analysis indicates issues regarding the retention of IP in Scotland, with some popular acts residing outside the country, resulting in their revenues not returning to the Scottish economy. An investigation of the Covid-19 pandemic demonstrates the inequalities across the music industries. Many of these were evident pre-pandemic; however, these have become exacerbated due to lockdown regulations. The main observation is the localisation of music activity across central Scotland, with data demonstrating Glasgow is the epicentre, followed by The Clyde Valley, Ayrshire and Argyll and then Edinburgh. The remainder of this chapter will discuss the findings from sections 5.1 and 5.2, placing them in the overall research context. Due to the comprehensive nature of the feedback, it was unexpected that the current study was overall reasonably positive. Interviews, in particular, were optimistic regarding the music industries in Scotland, although specific areas were highlighted for development and growth. The quantitative feedback was less so due to the closed questioning. However, it was evident within the qualitative survey feedback that respondents did not understand how some music sectors functioned, indicating that some feedback was from less experienced individuals.

## Economic Worth of the Music Industries in Scotland

Although Chapter Five measured the Scottish music industries in 2018, it is worth revisiting to discuss the broader significance. This thesis estimates that the music industries in Scotland generated profits for the Scottish economy of around £195,122,042 in 2018. The total income/funding of each sector are as follows:

Music creators' total income	£83,909,908
Live music total income	£175,522,826
Recorded music total income	£7,157,170
Music representatives' total income	£57,110,760
Retail total income	£26,340,000
Funding of music activities total expenditure	£46,962,212

However, double-counting transpired across sectors; therefore, a number of deductions occurred where relevant (breakdown in Chapter Five). It is estimated that the total profits/funding were:

Music creators' total profit	£82,537,408
Live music's total profit	£37,311,297
Recorded music's total profit	£7,157,170
Music representatives' total profit	£1,342,500
Retail total profit	£26,340,000
Funding of music activities	£40,433,667

For a country of its size, Scotland is generating a respectable amount of income for the Scottish economy. Comparing the Scottish data to that of UK Music for the same period (2019) highlights why this research was necessary. Whilst the UK sector is estimated to have generated £5.2 billion for the UK economy, this research estimates that around £195 million came from Scotland. What is evident is that whilst the UK recording sector is showing signs of recovery due to increased revenues from streaming, the Scottish sector has continued to decline. The previous Scottish report noted recording profits of around £39,489,000 (Williamson et al., 2003), whilst this thesis asserts that it is around £7,157,170 for 2018.

Additionally, the live music sector in Scotland is estimated to have generated a total income of around £175,522,826. However, most of that figure is generated for other stakeholders. Music creators are the largest beneficiaries; however, this includes non-domestic creators. However, this works both ways, with Scottish music creators bringing revenue back to the Scottish economy from international sectors.

The significant reduction in earnings highlights how much revenue from live music is reintroduced to other sectors of work within the music industries in Scotland.

### Strengths and Weaknesses of the Current Scottish Music Industries

Many of the issues presented in the findings for this thesis can be identified in Scottish Enterprises mapping Report (Williamson et al., 2003) and Creative Scotlands music sector review (Ekos, 2013b), which is significant as it emphasises that there has been no real growth or development taking place across the music sector. If anything, this thesis has highlighted that conditions have deteriorated.

The current roster of music creators (Appendix One) is the most robust export list for quite some time. A Dundee-based promoter exemplifies the overall response: “Talent-wise, we always have and continue to punch well above our weight” (741178-741169-81343900, 2021). Those interviewed illustrated that there are numerous ways to maintain a music career that does not follow the traditional path of recording and touring. The lack of revenue for music creators is an ongoing issue in the literature (Musicians Union, 2010; UK Music, 2019; Hesmondhalgh, 2021) and corroborated in primary research. Over three-quarters of those surveyed earn less than £20,000 annually from music. Analysis reveals that those who perform live generate higher revenues than those who rely on songwriting royalties. Musicians earn no more than £50,000 a year; however, one artist revealed he earned between £100,000 - £150,000. The highest earner was a composer, generating over £200,000 per year; however, they also performed live. Although these are impressive figures, it is worth noting that only seven music creators noted yearly earnings of over £40,000 a year from a possible sixty-five.

All the major music sectors are represented in Scotland to varying degrees. However, it is undeniable that the live sector is the primary economic driver, with a vast level of positive feedback relating to the industries buoyant health. What was once a stronghold for rock and pop has extended to other genres, with acts from folk and traditional music performing in large venues nationwide (Whytock, 2022). In 2008, the SAC noted that traditional music was reserved for those from the north of Scotland, often from middle-class families (Hibberd, 2009); however, they are currently at the heart of music-making and performing across Scotland. The increase in live agents nationwide is a testament to this, with Craig Corse and Katch Holmes operating new live agencies alongside Active Events. The fact that DF concerts now represent Elephant Sessions illustrates the revenue-generating abilities of these acts.

The provision of record labels is limited. It is telling that no new rock or pop labels have started since the 1990s. Qualitative feedback indicates that some feel Scotland would benefit from having major labels based here. Whilst that may be true from an artist investment perspective, any revenues generated would revert to offices based in another country, most likely London. The ability to develop new acts could be improved across the sector, with artist managers now taking the lead (Scougal, 2021). Analysis of all data sets reveals the difficulties in operating a label in the current climate. Two respondents generated encouraging earnings (£30k and £90k); however, most earned less than £10k annually. A number of interviews highlighted Olive Grove Records as an example of an indie label releasing great music; however, in its current guise, it is simply a labour of love. Although the owner appeared optimistic, it is clear that it is not a long-term model with the owner investing his personal savings, often losing money.

The lack of financial resources to develop new artists prevents potential revenues from remaining in Scotland; however, this is not a new problem (Williamson et al., 2003). As a result of limited record companies, there is a severe shortage of music distribution services, highlighted in the survey. Although Emu Bands received recognition, they only offer uploads to digital service providers without additional marketing support. The model is ideal for acts with a strong fanbase; however, a more bespoke package is required for new artists.

A consistent problem for music businesses in Scotland is the capacity to retain intellectual property, as Scotland only has one publisher of scale in 23rd Precinct Music. It is worth illustrating that no commercially successful artists have their publishing rights located in Scotland, resulting in a massive economic loss. Although retention was not specifically mentioned, publishing was among Scotland's highest sectors regarded as underrepresented. A high level of investment is required for record labels and publishing to improve in Scotland, which is problematic due to scaling issues and the potential to recoup funds (Montgomery, 2022). SE are the leading investment body for business; however, its relationship with music has been and remains fractured. As Homan et al. note, the "population size makes Scotland an inherently limited market for its artists" (2016, p23). Therefore, it is evident that funding these businesses would be high risk and does not offer the types of growth which currently receive investment.

Whilst the impact of media services continues to decline globally, music creators in Scotland remain invested in their services. Although not explicitly stated in the findings, this may be related to digital media. Radio play is still highly regarded, with BBC Scotland Introducing receiving criticism and praise for promoting new and emerging artists. However, the interest may arise from the royalties generated by spot plays.

## Structural Inequalities

A key conclusion drawn from the data is based on representation. The results support the notion of a male-oriented industry, with 96.3% of individuals identifying as white. Current literature agrees that women are underrepresented in music creator and intermediary roles (Homan et al., 2016; Bain, 2019).

The music industries in Scotland lacks diversity across all sectors, with only 3.6% of individuals not of white ethnicity, which correlates with recent literature which estimates that BAME in the UK is only 4.8% for music, performing, and visual arts (Brook O'Brien and Taylor, 2018). Additionally, the industry stakeholders interviewed for this thesis were all white, with no minority groups. However, the representation of women was higher, especially those in positions of power and across genres (Rodgers, 2022; Whytock, 2022; Maxwell, 2022; Montgomery).

Additionally, Gill Maxwell from the SMC noted difficulties encouraging girls to sign up for their youth development programs such as Hit The Road. The current uptake is around 70% male, although she noted that it dropped during the pandemic.

Music education in Scotland has been relatively healthy since the youth music initiative was introduced in 2003. Its activities have increased by around 10%, with 244,000 young people taking part in 2016/17, with 202,000 attending lessons in school and at least 42,000 participating in out-of-school activities (Broad et al., 2019). In this context, the delivery of services is impressive; however, looking more closely, it becomes evident that there are deeper issues with social mobility, geographical barriers and the attainment gap. Data supplied in the “What’s Going on Now” report highlights concerns with the delivery of music tuition. The report stresses the issue of a post-code lottery regarding which local authorities charge and which do not. However, it is worth noting that the SG removed all tuition fees for the academic year 2021/22, although there is no word as yet as to whether this will continue. Even so, this does not change the more significant issue of inclusion (Wilson et al., 2021)

Households earning less than £28,000 per annum are 50% less likely to have a child learning an instrument than households earning over £48,000 (MU, 2010). Furthermore, the cost of an instrument is also crucial for families when deciding whether they can provide tuition for their children (Catchpole and Karoni, 2018).

Survey data indicates that those who received private tuition were more likely to become professional musicians with music as their primary source of income. Further analysis suggests that those who received private tuition are more likely to be linked to classical, folk or traditional music. In this sense, a lack of economic and social capital will disrupt the talent pool of aspiring musicians entering specific genres of music. Not only the opportunity to access but also from believing that a music career is possible. The same problems are witnessed when investigating those who attend the RCMS in Glasgow. Applicants must be able to perform to a high degree, which in most cases would only be possible with specific social and economic attainment. However, this is not true across all genres.

Half of the survey respondents highlighted various forms of discrimination experienced whilst working in Scotland, with gender and age the most prevalent. The analysis reveals that reports of gender discrimination predominantly came from females, with one respondent explaining,

“The culture of attitudes and prejudices regularly practised within the infrastructures of our current music industry fails to cultivate new talent efficiently and fails to protect underrepresented demographics from abuse and bullying”, adding that “poor working conditions, poor conduct, and risk of sexual assault, create a male-dominated scene whereby some (many) women will not achieve their full commercial potential” (741178-741169-81335192, 2021).

Based on the literature, it would be safe to assume some possible causes. Female music creators believe it is harder for them to gain recognition than men, with sexual harassment and objectification cited as fundamental challenges. These are due to unbalanced power dynamics, which this research demonstrates is a male-dominated industry (Kahlert and Das, 2021). Representation remains an ongoing issue with uneven gender splits at festivals. There was a consensus from music promoters that it is possible for equal representation, whilst those representing festivals confirm that they actively pursue it; however, that does not necessarily mean that it is delivered. An attempt from DF concerts at their 2019 TRNSMT festival in Glasgow saw them deliver a stage named “Queen Tuts” after an International Women’s Day event held at King Tut’s Wah Wah Hut. Placing female performers on their own stage only served to further distance them from the equality they seek. Feedback to the event was fairly negative, with electro-pop artist Malka explaining, “I think the whole Queen Tuts stage thing was just embarrassing” (Schlesinger, 2022). Even with the negative reaction, DF did spark a national conversation on the topic; however, it is worth noting that the first wave of acts announced for the 2020 event saw two females from a pool of thirteen acts. However, the reality of business is to make a profit (Bruenger, 2016). Therefore, it is understandable why large institutions appear fearful of trying to make a change, especially in the current climate of economic hardships.

Another area of prejudice which was discussed in several interviews is the “motherhood penalty” (Bain, 2019, p25). In society, women traditionally accept the role of primary caregiver to their children. However, often, this can become a



choice between having a family or pursuing a career. With many music creators and intermediaries operating as freelancers, there is no scope for maternity pay. The demands of creative work do not fit with having a child, especially for those who wish to tour, which, for many, is the primary source of revenue. In this sense, women are penalised for starting a family, whereas men do not face similar barriers. However, this is transforming in some instances, with live agents now requesting childcare be factored into touring costs (Whytock, 2022). Additionally, CS provide fiscal support via the Open Fund, which is in place to enable, in this case, parents to take part in work that they would otherwise not be able to do. Although the funds are available for musicians on tour, the example provided via interview was related to supporting mothers who require studio time (Whytock, 2022).

## Cultural Funding

Funding opportunities received the highest response when exploring under-represented areas of activity, supporting the view that there are insufficient funding opportunities. However, there is also a feeling that applying for funds from CS is complex, which would discourage individuals who are not computer literate.

The current study found that cultural funding was a contested topic across both data sets. Interview data was sympathetic to the task of CS, whilst survey responses were more critical. It appears that individuals feel the funding system in place is currently not working, with respondents explaining that “funding seems to be nearly impossible to get to start a new venture” (741178-741169-81369652, 2021) with another response broadening their critique, explaining that the “government fail to supply adequate funds to the arts” (741178-741169-81374831, 2021).

Although the general findings are somewhat negative, interview data was more positive. However, there are several potential reasons why this was the case. First, individuals may not have wanted to demonstrate displeasure with funding for fear of losing out on possible future funds. A second reason could be the anonymity associated with completing the survey compared to in-person interviews. The final reason and what is the most plausible relates to who was

interviewed. Each participant was carefully selected as they were key stakeholders in their respective fields. Many receive funding regularly from CS and, therefore, have a working relationship with them. What is evident from the qualitative feedback is the lack of understanding amongst some respondents regarding the purpose of funding. Responses from the survey emphasised the need to fund commercial activities and help invest in specific sectors. However, those interviewed appeared more aware of the role of CS and its limitations. There were instances where younger stakeholders were less aware (Scougall, 2021).

## Business Development

Economic development agencies in Scotland are limited in their reach and encounter the same issues as cultural funding. Although SE and the HIE are in place to support the creative industries, they have no discernible music policy (Homan et al., 2016). The current study found that the music sector in Scotland is deficient in several sectors, consistent with previous research (Williamson et al., 2003; Ekos, 2013). Although it appears that providing funds to develop a more profitable infrastructure would improve the sector, in reality, it would be more challenging. Record companies and publishing companies are not immediate generators of revenue (Montgomery, 2022), requiring acts of substantial fame to generate high economic returns. As noted elsewhere in this thesis, Scotland is small in size and limited in its capabilities to grow and sustain careers.

## SMIA

In addition to financial assistance, several interviewees questioned the role of the SMIA. Analysis of the current setup reveals that whilst they have delivered noteworthy projects such as the music business innovation programme and workshop programmes, they have had no real impact on the music sector other than their flagship event, the SAY award. The funding contribution from CS to the SMIA was also questioned in one interview. It was emphasised that the guarantee of regular funding was insufficient to receive financial support when their only meaningful deliverable is the SAY award. A number of other interviews questioned their actual role within the Scottish music industries.

From an outsider's perspective, it could be assumed that CS are happy to deliver funding to the organisation so that they are at arm's length of any criticism aimed at developing the music industries. However, the organisation has gone through three different chief executives, which may have affected their ability to implement any real change in recent years.

One interview highlighted the problematic job the SMIA has in trying to unify both the commercial and public sectors with one voice. However, they deserve praise for playing a crucial role in bringing together the SCMIT to deliver feedback to the SG during the pandemic. The action illustrates that there is a more significant role for the organisation.

## Impact of Covid-19 on Music Creators

As discussed in Chapter 7, the pandemic affected the music sector on several levels; however, the current examination will demonstrate the impact of lockdown restrictions on revenue and employment. It is evident from the data that the loss of income was challenging for many operating across the sector. However, the impact was most apparent with music creators impacted by the cancellation of cultural events. These were predominantly artists and musicians who generated most of their income from performing before the pandemic, which is corroborated by similar research from Crosby and McKenzie (2022).

Artists often work in activity cycles, with periods of performing live followed by periods of writing new material and then recording. For those at the end of their touring cycle, the pandemic may have impacted revenue less than those about to begin longer touring schedules. There are also those musicians who are part of the gigging economy and rely on the income from live gigs as their primary revenue source. The data suggests that although music creators were negatively affected, this was disproportionate to those who generate live performance revenue. However, another aspect provided by C Duncan added another dimension to lockdown restrictions "it's not even the loss of actual income; it's a loss of work" (2021). In this sense, artists were losing revenue in the short term;

however, the pandemic's long-term effects can be identified as a loss of opportunity and a possible lack of growth.

Additionally, some music creators do not perform live, and therefore, little change was encountered with lockdown restrictions. Although songwriters and composers are tasked with creating cultural texts, several participants identified in the data also perform live to boost their revenue. However, one interview with pop artist Malka (2021) revealed that not all artists use performing live to generate revenue. Although this is the predominant method of making a living in the music sector, Malka revealed how she uses sync placements to make a living whilst performing the occasional gig. Further investigation revealed that the situation was born out of necessity as she has small children, and extensive touring is not an option. In this sense, Malka's actions are a perfect example of entrepreneurialism in the music sector.

The support available to music creators was disjointed and revealed a lack of understanding of how cultural workers operate in the music industries. The UK government schemes were more appropriate for workers in full-time contracted employment. Music creators often function as freelancers who failed to qualify for financial support, with The MU noting that around 90% of their members are self-employed. However, CS responded proactively to the needs of freelancers by efficiently offering economic support as early as March 2020, for which they deserve praise. Whilst the reasons for not applying were not disclosed, the high success rate for those who did apply has undoubtedly helped those in need. Additional research (C Duncan, 2022) has also revealed that professionals who set up a pay structure receiving dividends instead of a wage were not eligible to access funding from the SEISS, restricting assistance to those who were in need.

Although not implicitly stated, music creators have used their own cash reserves to weather the storm during the pandemic (SMIA, 2020). Their struggles have been discussed by many of the intermediaries interviewed, who themselves have actively tried to help the creators they represent. This is true of music managers but also agents and publishers too. One manager explained that their primary concern was "trying to keep businesses alive and keep people sustained through whatever route we can find financially" (Interview 1, 2021). Live Agent Lisa Whytock echoed that sentiment, adding that "the main objective was keeping the

artist going” (Whytock, 2022). This stance was reflected by many of the intermediaries, who showed as much concern for their roster as they did their own companies. In this way, music creators are exposed as a critical element of the music industries in Scotland.

## Chapter Nine: Conclusion

This research is the first academic endeavour to map and measure the Scottish music industries since Williamson et al. (2003). Creative Scotland commissioned a sector review in 2013; however, no attempt was made to estimate the overall sectors economic worth. Therefore, almost twenty years have passed since any financial measurement has occurred in Scotland. In that time, the music industries have evolved due to several advancements in consumer and media technologies.

Academic interest in cultural mapping has become prevalent recently, particularly within the creative industries from micro and macro perspectives. The purpose of mapping studies is often to stimulate a particular sector's activities by highlighting their economic worth and growth potential. Therefore, this thesis sits alongside Carr's research (2022a; 2022b).

The first section of the chapter will discuss the main contributions of this thesis, including the determinations from the two research questions and the subjective positioning of the mapping project in relation to the researcher. The second section will look at the research aims which were drawn from the literature review. The third section will reveal the significance of the findings, followed by the thesis limitations in the fourth section. Section five will reflect on the thesis, primarily highlighting the changing relationship with the SMIA over the course of the project. The sixth section will offer a number of recommendations to improve the sector from a commercial and policy perspective. Section seven will offer a number of areas for future research based on the findings of this thesis. The final section will wrap up the thesis by revisiting an argument discussed in the literature review.

### Main Contributions

It is important to highlight that this is the first piece of research by an active musician to map and measure the Scottish music industries from an artist-centric perspective. While other mapping projects are comparable in some respects, my participation in the global music industries offers a unique viewpoint that sets this

research apart. The thesis has provided an opportunity to shift the academic focus away from the three core sectors of live music, recorded music, and publishing to provide a broader nation-specific model that represents Scotland's diverse needs.

The theoretical framework comes from Beckers's (1982) assumption that cultural objects, such as musical texts, are created in collaboration with a multitude of intermediaries. Annual research from UK Music promotes the music sector in the UK and the profits it generates. However, this thesis has made a significant contribution by highlighting the importance of music creators, which is often negated within literature. This research has shown that value is not created in a linear fashion. Music creators develop a value proposition that intermediaries integrate with their unique resources. The new step in the process is the application of technology by consumers who have now become part of the value-creating process by utilising the Internet and social media sites. In this sense, value is co-created cyclically amongst music creators, intermediaries, and consumers. However, it all begins with the music creator.

### **Research Question One**

The first research question sought to estimate the economic worth of the music industries in Scotland for 2018, contributing specific country-wide data that has, to date, been included in UK-wide estimations. Based on quantitative analyses, it is estimated that the music industries generated £195,122,042 in profit. The figure includes funding from the SG, CS and several other sources.

The results demonstrate that the live music sector in Scotland is the primary source of revenue for numerous other areas of music activity, with an estimated income of around £175 million before costs. Additionally, this thesis aimed to evaluate the additional revenue from music tourism. By utilising a multiplier from CEBR (2020), it is estimated that for 2018, live music activities in Scotland generated around £406,178,317.

Although these figures are promising, the mapping and economic estimations have revealed that value extraction often occurs regarding companies outside Scotland. The inability to retain IP created by music creators is a significant issue for the sector as a whole and for the broader Scottish economy.

## Research Question Two

The second research question sought to investigate how the COVID-19 pandemic disrupted the Scottish music industries whilst identifying its vulnerabilities to disruptions. Overall, this thesis has noted that the pandemic caused significant economic hardship across all music sectors, with the disruption felt most by those working in live music and music creators. The findings also reveal that there were a number of pre-existing issues which were heightened as a result of lockdown measures. Freelance cultural workers were severely affected due to the nature of their employment patterns and low income, particularly those from working-class backgrounds and those from black and minority ethnic groups. The fundamental truth is that those with the lowest incomes were the worst affected. Music creators noted increased issues with their mental health due to a sudden cessation of work and lack of stable income, and there was a noted shortage of knowledge on how the music industries functioned by those in government, which resulted in delays with economic support.

Additionally, as the first research question noted, the music industries are highly reliant on live music as the key revenue generator for those working in Scotland. The recording and publishing sectors do not provide enough income to sustain many musicians; therefore, Scotland is in a vulnerable position by having such a strong dependency on one core sector. While these issues were identified during the pandemic, they are still potential vulnerabilities for the future.

The thesis has made a significant contribution to knowledge regarding the pandemic's impact on the music industries in Scotland whilst highlighting several pre-existing structural flaws. The research allowed for an investigation into both historical and current problems, which the partner organisation can now address. Whilst many of these issues are not specific to the Scottish context, the impact is distinguishable due to the variation in industry structure.



## Main Findings

Three key aims were constructed by dissecting the research questions and critically analysing the literature. These will now be discussed along with the concluding outcomes.

### **Map the Scottish music industries and identify their strengths and weaknesses.**

This study has revealed that the Scottish music industries are not structured in accordance with other global music economies. Rather than the core three economic activities of live music, recording, and publishing (Rodgers, 2012; Hesmondhalgh, 2019), Scotland should be investigated using a new seven-sector model.

- Music Creators
- Live Music
- Recorded Music
- Music Representatives
- Music Retail
- Funding and Development
- The Media

Music creators remain the unique element of any music economy as they create the value proposition intermediaries use to develop value. In recent years, Scotland has delivered several acts that are household names, with Lewis Capaldi becoming a global phenomenon, which has undoubtedly boosted the economic footprint of music creators. However, the key issue facing most musicians is fair remuneration for their work, particularly with the introduction of streaming sites such as Spotify and Apple Music.

Live music is the most noteworthy sector for generating revenues, which are then redistributed around the live music ecology and the broader sector, helping to

sustain other members. Even though the revenues are impressive, grassroots music venues are holding on for survival after the impact of Covid-19 and, more recently, the cost-of-living crisis. During the research, it became apparent that the role of music promoters has expanded to include a form of A&R for new acts by providing them with a platform to perform and helping develop their live career before they are signed to a record label.

The recording sector is a mixed area with both strong spots but also many in need of development. Recording studios are the most lucrative element, generating an estimated five times more revenue than record labels. A recurring issue has been the lack of a dedicated export office, which has been highlighted in several interviews. Whilst it is still being determined if it would have any real impact on popular music, the work conducted by Lisa Whytock and Expo Scotland signals what is possible. One of the biggest concerns identified from interviews was the loss of IP, one of the most lucrative elements of value in the digital economy. With no means of investing in music creators, publishers and record labels are losing the opportunity to keep revenues in the country. This issue has no identifiable fix as it is not necessarily solved with an influx of cash.

Music managers are integral to music economies as they are required to understand all areas of the music business that continue to grow and transform. Scotland has an array of successful music managers; however, they almost exclusively look after Scottish-based artists, although this is more likely a geographical issue rather than talent or experience. The number of live agents has grown since the previous Scottish mapping report in 2003, with ATC Live opening an office that predominantly targets commercial pop and rock acts. Lisa Whytock has successfully helped develop the trad and folk scene across Scotland, which has grown to become lucrative both locally and internationally for Scottish artists. However, music publishing remains one of the worst-performing areas of the music business in Scotland, with no current commercial acts signed by a Scottish company.

Physical music sales have declined since the introduction of downloading sites, followed by streaming platforms. However, one area that has experienced growth is the sale of vinyl records. Although the number of independent record stores in Scotland has fallen over time, this may have been beneficial for the remaining

stores. Music instruments remain one of the most lucrative areas within Scotland. Interestingly, the highest category of sales is equipment for home recording, which has increased due to the entry-level cost.

Throughout this study, the cultural funding of music activities has been frequently discussed in interviews and qualitative survey feedback. Whilst there are currently no dedicated popular music policies per se, CS does provide more support to music activities in Scotland than any other art form, with particular recognition for the YMI. While the level of support in Scotland is worthy of praise, the way these funds are distributed could be more impartial. For example, the NTCs receive a high level of ringfenced funding, whilst jazz organisations do not know if they will be operating year on year. The practice appears to highlight a hierarchy of cultural significance, with specific genres attracting more support than others.

Music maps do not often include the media in their reporting. However, it is essential to acknowledge the impact they can have on an artist's career acting as tastemakers. Whilst many traditional mediums are declining (press, radio, etc.), newer online alternatives have emerged. YouTube has established itself as the new way to consume live visual content, whilst Spotify is the preferred medium for discovering new music for the 16-35 demographic. Music reviews remain integral to assigning value to new artists, but again, many of these are now found online with the decline of music magazines such as NME and Melody Maker. The most notable shift across all media is the ability for fans to become the generators of value through their own reviews and promotion of music via social media sites.

**Examine notions of economic, social, and cultural value, with a strong leaning toward exploring the production of economic value among music creators and cultural intermediaries.**

The value of music should not be minimised to its economic impact alone. It has been highlighted earlier in this thesis that financial investigations are the key source of inquiry within most commercial mapping projects. Those who commission reports are often interested in topline figures to help draw attention to the health of a chosen sector of the economy. However, in the case of music, cultural goods can also provide additional benefits as they contain a use value

alongside an exchange value. This thesis has illustrated that a holistic approach to value would be more beneficial than economic analysis alone.

Fantastic work is occurring in Scotland from various organisations that utilise music to positively impact individuals' lives. Drake Music offers opportunities to play, learn, and compose music for those living with a disability, whilst Nordoff Robbins provides music therapy for a diverse range of people, with each session striving to deliver a tailored approach based on the client. The Scottish Music Centre offers support to young people looking towards a career in music with Hit The Road and Ignite offering commercial opportunities. However, it is their MusiCares initiative which deserves high levels of praise. The initiative targets young people in care to deliver music lessons across multiple genres. The program has been so successful that organisers are struggling with demand. Whilst these are just a handful of examples, it is evident that music can play a more significant role in society than generating financial gain.

A stronger understanding of cultural value would strengthen cultural organisation's attempts to receive public funding. Historically, economic value has been central to arts funding, with the measurement of cultural value often noted as challenging. However, as this thesis has noted, it is possible to measure the impact of events through qualitative assessment, as noted by the Cultural Value Project. Whilst these are time-consuming, they would help deliver a nuanced account of the impacts of music interaction.

**Investigate cultural policy decisions implemented as a result of the pandemic, with particular attention given to the impact on cultural workers.**

Scotland currently lacks any popular music policies that aim to support the development of the music industries. Music activities in Scotland have long been left to market forces with very little input from the Scottish government other than policy considerations relating to live music and licensing. This point was further illustrated by the government's response to the pandemic. The cultural recovery fund was delivered across several allocations to target various elements of music across commercial and public sectors. Although the SCMIT highlighted the sectors that required support, fiscal support was only made available to organisations already receiving regular funding from CS and other not-for-profit organisations for

the last allocation of support. However, it should also be noted that the pandemic saw the most significant investment of money into popular music in Scotland than ever before which is worthy of praise.

The pandemic demonstrated the networked nature of the music industries in Scotland. With all socio-cultural events cancelled, Scotland's primary revenue source was unavailable. This had ramifications for the remaining sectors, primarily for music creators who lost their immediate mode of income. A persistent problem for music creators remains identifying them as workers. The fiscal support offered by Westminster should have been more comprehensive and included a large portion of the cultural workforce who utilise portfolio careers and work on a project-to-project basis. Many workers did not receive adequate support and had to find work from other sources.

While the government currently has no popular music policies to develop commercial business interests, it does have a successful youth music development policy through the YMI. The scope and reach of the YMI is worthy of praise; however, there are noted concerns regarding access, particularly with working-class children and those from particular geographical areas across Scotland.

## Significance of the Findings

The purpose of this research was to map the music industries in Scotland and identify each sector's strengths and weaknesses. UK Music continually promotes the UK music sector as performing well economically when, as this thesis has shown, this is not the case for Scotland. Therefore, it was essential to provide an overview of the Scottish music industries and reveal its own diverse needs as a stand-alone sector. By doing so, the partner organisation can utilise the data and make informed choices regarding their future plans to improve specific areas. The findings will also allow for more nuanced research regarding the problem areas highlighted in this thesis.

The thesis provides a number of significant contributions to the literature, particularly discussions regarding the value of music. Conversations often only

examine commercial music's economic benefits without analysing how that value is created. This research is significant as it acknowledges music creators as the originators of value. However, this raises more concerns as there is very little support for early-career music creators.

The data is also useful to policymakers should they decide to implement any popular music policy. Chapters Four and Five present an overview of the musical landscape in Scotland with economic figures for each sector. These estimations are critical as they allow for a deeper analysis of which sectors are performing well and which are not. The thesis also identifies areas where value extraction occurs. With intervention from policymakers, this could be prevented, which would boost the economy of Scotland.

## Limitations

The research has a number of limitations, which stem from its broad scope. A team of investigators often conducts large research projects such as this; however, this project was executed by one researcher. The nature of the research resulted in an overview of each sector rather than a deep dive analysis.

From the outset of this project, I knew that providing an accurate economic figure for the music sector in Scotland would be problematic. Collecting precise economic data for every music creator, music business and freelancer working in Scotland would be nearly impossible. The survey was valuable in requesting income based on a median system; however, a lower response rate for some sectors led to the use of other sources, such as Companies House. My goal was to achieve a more accurate representation of the economic impact of the music industries in Scotland than the previous mapping in 2003. I feel optimistic that this was achieved.

The intention of the thesis was to investigate the economic, social and cultural value of the music industries in Scotland. However, early analysis of the literature highlighted challenges in data collection. Due to the pandemic, it was decided to concentrate primarily on the economic impact. It is possible to measure music's social and cultural value using techniques utilised by cultural economists;

however, this would have been a timely exercise. Instead, the thesis briefly mentions the social impacts with a mix of secondary data analysing cultural value to highlight their importance. Therefore, there needs to be more insight into the true value of music, which is a notable limitation of this research.

Whilst the methodology is relatively standard for this type of mapping study, there are notable limitations regarding data collection due to lockdown restrictions and scope. The response rate to the survey was far lower than expected. However, this can be attributed to fatigue due to the number of surveys arts organisations were releasing at the start of the pandemic. Additionally, arranging interviews when most of the Scottish music industries were closed was challenging. The preferred method of interview would always be in person; however, due to travel restrictions, many were conducted online via Zoom or through an exchange of voice notes. The most significant limitation was making sure every genre was included in the thesis to offer a balanced account of the diverse needs of individuals. Every attempt was made to be as inclusive as possible; however, some individuals just did not respond. Although a higher number of males completed the survey, I was conscious of this and tried to offer a more balanced view with interviews. The lack of minority groups within the study is also a significant limitation.

## Reflections

The critical task for this thesis was defining Scotland's music sector and, ultimately, the framework for the remainder of the project. The seven sectors were carefully selected to identify their economic worth whilst illustrating their social and cultural benefits. I feel that this was successful as it has supported the remainder of the study. It is, again, important to highlight that the research is a subjective piece of work from my perspective as a music creator. Should a similar project occur with someone from live music or recorded music, I am aware that the outcome and findings could vary due to industry perspectives. The fact that most music maps have different industry structures is a testament to the subjective nature of mapping projects and those who conduct them.

The main point to reflect on is the collaborative nature of this PhD. Although the process started well, by early 2021, the partner organisation stopped returning my emails and had no further involvement in the project. However, it is worth noting that the agency has undergone several personnel changes, which disrupted its operations. Additionally, the pandemic has significantly impacted the Scottish music industries, and the SMIA were at the forefront of negotiations with the SG for fiscal support. Upon completion of the PhD, the SMIA once again contacted me and were curious to discuss the outcome of the thesis.

The thesis did not suffer from a lack of involvement, as most of the groundwork was laid in 2020. I was fully aware of what the SMIA wanted in terms of data and continued on that path. The only area that ultimately could have been more collaborative was the presentation of findings. However, in hindsight, this was a positive, as I had the freedom to analyse and synthesise the findings with no interference.

On reflection, there are several things I would change if I were to start the project again. Early in the process, I consulted with Tim Wright from Twin Tangibles, who offered advice on measuring the economic worth of the music sector in Scotland. His advice was valuable; however, due to the pandemic, contact became less frequent. Having a specialist to discuss ideas with would have saved a lot of time and errors.

Previous music maps have often had steering groups to direct the study and offer recommendations. My expertise is from a music creator perspective, so having the opinions of others from various sectors may have helped me focus the project and direct it to areas I was unaware of.

One glaring omission from this study is rehearsal spaces for music creators. I regret not including these now. While their revenue is not significant, they remain critical spaces for creativity and social spaces for meeting like-minded individuals.

Looking back over the project, I see it would have benefitted from adding case studies. These could have shown how a record is made in Scotland and the path of value creation from writing to consumption. A similar case study could have



broken down the costs of a live show, revealing the costs for both a promoter and a music creator.

## Recommendations

Based on the outcome of the overall thesis, recommendations for practical implementation will now be offered.

- Several interviews identified Scottish Enterprise needing more meaningful interactions with music businesses. It would be beneficial if the organisation outlined how it could help the music sector as it has more specialised requirements than other creative industries. Without intervention, the infrastructure will not improve on its own. One suggestion from Lisa Whytock (2022) was a possible return to the old method of funding where the commercial sector had a dedicated reserve of funds. In this system, assistance could be delivered to specific areas of activity needing direct support.
- Whilst CS does not have direct funding channels explicitly for commercial activities, it could follow the model outlined by the Welsh assembly and provide a dedicated fund for music creators and one for music businesses. Additionally, in line with other European countries, a stipend programme for a select number of artists on an annual or three-year basis could be introduced to help them develop their craft at critical points in their careers. This has been successfully implemented in Sweden, which is comparable in size to Scotland, via the Swedish Arts Grants Committee.
- Following on from the protection offered during the pandemic. It would be a positive move to protect grassroots music venues in the same manner as the national touring companies. The socio-cultural importance of these institutions cannot be overstated as development sites for new, up-and-coming bands and artists. I can confirm from

my own experience performing in a band that learning your craft in these small venues was integral to my career success.

- A dedicated export office could potentially help to boost the Scottish economy. Business Gateway did have this at one point; however, it disappeared without warning. The SMIA conducted a feasibility study and offered modelling on how it could be executed although nothing thus far has emerged. By analysing the impact and ROI reported by Lisa Whytock, it would make sense to have a similar agency for popular music as well.
- The introduction of additional support for early career working-class musicians. The SG offers support via the YMI; however, there are identifiable issues with attainment. The provision of free instruments (borrowed or donated) would be a preferable starting point with additional lessons and industry support based on means testing.
- The Scottish government should consider including notions of social and cultural impact in its economic impact statements when examining investments in the cultural sector. This would offer a holistic perspective, which would help support the argument for additional funding.

## Future Research

Further research is required in the form of a feasibility study to identify what would be required for IP to be retained within the country. It would be a time-consuming and costly exercise; however, recent success stories such as Lewis Capaldi and Paolo Nutini indicate the high levels of return, which retention could help to combat.

Although this thesis has given a broad overview of the commercial sector in Scotland, future studies should narrow in scope to investigate specific locations where music is created. It has been challenging to encompass all genres within all locations; therefore, micro examinations are necessary to understand the music-making practices of music creators within specific locations.

The original plan for this research was to investigate the economic, social, and cultural value of the music sector in Scotland; however, when the pandemic transpired, the research questions were altered to address the sector and the impact of lockdowns. Further research is required to identify the social and cultural value of the commercial music industries in Scotland.

## Final Thought

I want to conclude the thesis by returning to a quote first addressed in the literature review. Frith et al. claimed that “it is a healthy musical culture that leads to a flourishing music industry and not an investment in music industry infrastructure that creates a flourishing musical culture” (Frith et al., 2009, p80-81). This argument has become a staple of thought when concluding this thesis. Frith et al. believe that time, resources and space are essential for a prosperous music economy.

First of all, time. As I noted myself in the methodology, time is scarce for many music creators. Most are required to work in order to pay bills, which has led to a decline in working-class musicians who struggle to have full-time jobs and pursue a music career. With the cost-of-living crisis, the issue has only become more challenging. Although the authors discuss the importance of unemployment benefits, this is barely enough to survive within the current landscape of the UK. One area I agree with the authors is the important role of higher education. Attending an institution and meeting like-minded people can break down barriers and bring people together. The importance of social connections can not be overstated and can lead to potential career opportunities further down the line.

The second crucial element is resources. The YMI is one of the most critical initiatives for developing young musicians in Scotland; however, there are geographical challenges and issues with class attainment. Those from working-class backgrounds with very little economic support will face a number of challenges, beginning with funds to travel to lessons, obtaining additional tuition and problems with purchasing an instrument. The most critical element of

resources is the support of a parent, either as a way to instil musical values through the introduction of culture growing up or by supporting their children's endeavours and showing belief in them. Again, the difference here is economic. Some families have the resources to expose their children to music, whether it be live shows or recorded music. Whilst not everyone has the financial support to buy new music for inspiration, most people nowadays have access to a smartphone, which allows them to access YouTube and Spotify.

The final component is spaces. Although rehearsal rooms have somewhat declined across Scotland, the situation is similar across the UK. This is partly due to rent increases and long-term closures due to the pandemic. However, bands are now leasing commercial premises as an alternative. Although Scotland has seen the closure of many music venues over the last twenty years, many still operate successfully. Whilst there are issues of scale in some cities, such as Inverness and Dundee, the biggest challenge remains supporting grassroots music venues, which are integral to the development of music economies.

Overall, Scotland has a healthy music culture, as it has produced several commercially successful music creators globally in recent years. However, that has yet to lead to a flourishing music industry. It is vital to distinguish between the two. Previous investments from the SG to grow music businesses, most notably the Futures Fund, did very little to improve the situation. It is clear that many of the structural issues facing the development of the music industries in Scotland are financial; however, without a clear, long-term plan, the situation will remain unchanged.

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# Appendices

## Appendix One – Music Creators

1	Artists								
9									
10	pop		£236,333	£236,333	41 gigs	£236,333	£173,875	£143,500	41 gigs x 1500 (mix of small, big and support) 1000
11	pop	£150 - £200,000		£175,000	95 gigs	£213,737	£213,737	£332,500	47 large supports - 48 gigs and festivals - 1000
12	hip-hop			£256,825	58 gigs			£203,000	27 gigs - 31 supports and festivals - 1000
13		under £9,999		£5,000				/	/
14		under £9,999		£5,000	2 gigs			/	/
15	Pop	£10 - £20,000		£15,000	2 gigs			£3,500	/
16	Rock		£764,925	£764,925	95 gigs	£764,925		£498,750	1500
17		under £9,999		£5,000	1 gig			/	/
18		£50 - £70,000		£60,000	40 gigs			35,000	250
19		under £9,999		£5,000	3 gigs			/	/
20	Rock		£315,996	£315,996	40 gigs	£315,996		£210,000	1500
21		£10 - £20,000		£15,000	13 gigs			£4,550	100
22	Pop	£10 - £20,000		£15,000	24 gigs			£4,200	50
23		£20 - £30,000		£25,000	43 gigs			£7,525	50
24		£10 - £20,000		£15,000	12 gigs			£4,200	100
25		£20 - £30,000		£25,000	23 gigs			£8,050	100
26	Indie	under £9,999		£5,000	23 gigs			£4,025	50
27	Singer	£30 - £40,000		£35,000	39 gigs			£6,825	50
28		under £9,999		£5,000	13 gigs			£2,275	50
29	Traditional	£40 - £50,000		£45,000	25 gigs			£8,750	100
30	Electronic	under £9,999		£5,000	11 gigs			/	/
31		under £9,999		£5,000	7 gigs			£1,225	50
32	Indie	£50 - £70,000		£60,000	37 gigs			£32,375	250
33	Indie	under £9,999		£5,000	4 gigs			£1,400	100
34	Indie	£20 - £30,000		£25,000	44 gigs			£15,400	100
35		£20 - £30,000		£25,000	19 gigs			£16,625	250
36	Indie	£30 - £40,000		£35,000	20 gigs	£11,743		£17,500	250
37	Indie		£500,000	£500,000	20 gigs			£140,000	2000
38		£30 - £40,000		£35,000	25 gigs			£21,875	250
39	Indie	£50 - £60,000		£55,000	14 gigs			£24,500	500
40	Rock		£451,200	£451,200	55 gigs	£451,200		£288,750	1500 - 26 large US supports with NIN
41		£20 - £30,000		£25,000	43 gigs			£7,525	50 - mostly supports
42	Pop	£1,135,686		£1,135,686	62 gigs	£1,135,686		£434,000	2000
43		£176,294		£176,294	47 gigs	£176,294		£164,500	1000
44	Rock	£156,076		£156,076	15 gigs	£156,076		£105,000	2000
45	Pop	2,767,938		2,767,938	54 gigs	2,767,938		£378,000	2000 - Large Ed Sheeran support across america
46	Pop	£25,975		£25,975	0 gigs	£25,975		/	/
47	Rock	£2,025,738		£2,025,738	86 gigs	£2,025,738		£728,000	9 arenas (6000) 77 gigs (2000)
48	Pop	£881,486		£881,486	41 gigs	£881,486		£287,000	2000
49	Rock	£127,786		£127,786	26 gigs	£127,786		£182,000	2000
50	Pop	£186,756		£186,756	98 gigs	£186,756		£34,300	small US tour. All other gigs supports - 100
51	Pop	£1,147,205		£1,147,205	20 gigs	£1,147,205		£140,000	2000
52	Indie	£617,733		£617,733	65 gigs	£617,733		£434,000	2000
53	Rock	£484,782		£484,782	25 gigs	£484,782		£120,750	1500 (australia and festivals)
54	Rock	£50 - £60,000		£55,000	12 gigs			£21,000	500
55		£50 - £60,000		£55,000	38 gigs	£16,617		£33,250	250 (average, couple of 2000, mostly 250-500 in USA and Europe
56	Rock	£70 - £100,000		£85,000	57 gigs			£98,750	500
57	Pop	£150 - £200,000		£175,000	32 gigs	£25,765		£224,000	2000
58	Rock	£10 - £20,000		£15,000	6 gigs			£5,250	250
59	Indie	£20 - £30,000		£25,000	17 gigs			£14,875	250
60	Traditional	£10 - £20,000		£15,000	6 gigs			/	/
61	Electronic	£20 - £30,000		£25,000	22 gigs			/	/
62	electronic	under £9,999		£5,000	16 gigs			£2,800	50
63	pop	under £9,999		£5,000	13 gigs			£2,275	50
64		£50 - £60,000		£55,000	27 gigs			£19,250	250
65		£70 - £100,000		£85,000	8 gigs			£56,000	2000
66	rock traditional		£2,400,000	£168,186	55 gigs	£168,186		£192,500	1000 (12 supports)
67		£20 - £30,000		£25,000	16 gigs			£112,000	10,000
68	Indie	£70 - £100,000		£85,000	36 gigs	£50,149		£14,700	100
69		£70 - £100,000		£85,000	45 gigs			39,375	250
70	Indie	£20 - £30,000		£25,000	16 gigs	£39,951		£14,000	250
71		under £9,999		£5,000	4 gigs			/	/
72		£20 - £30,000		£25,000	28 gigs			£9,800	100
73	Indie	under £9,999		£5,000	1 gig			£1,750	500
74		under £9,999		£5,000	4 gigs ?			£3,500	250
75	Indie	£40 - £50,000	0	£45,000	27 gigs	9,926		23,625	250
76	Indie	under £9,999		£5,000	4 gigs			£1,400	100
77	electronic	£100 - £150,000		£125,000	61 gigs	£42,479		£1,225	50
78		£10 - £20,000		£15,000	11 gigs			/	/
79		£10 - £20,000		£15,000	2 gigs	£16,323		£9,625	250
80	Indie	under £9,999		£5,000	6 gigs			£1,750	250
81		£10 - £20,000		£15,000	20 gigs			£5,250	250
82		£10 - £20,000		£15,000	14 gigs			£17,500	250
83	rock	£70 - £100,000		£85,000	6 gigs			£4,900	100
84		under £9,999		£5,000	6 gigs			£21,000	1000
85		under £9,999		£5,000	4 gigs			£1,400	100
86	pop	£70 - £100,000		£85,000	67 gigs	£81,647	£208,540	£7,350	100
87	Indie	under £9,999		£5,000	4 gigs			£3,500	250
88	pop	£70 - £100,000		£85,000	67 gigs			£2,625	250
89	Indie	under £9,999		£5,000	3 gigs			500	/
90	pop	under £9,999		£5,000	1 gig			/	/
91		under £9,999		£5,000	1 gig			/	/
92	rock	£70 - £100,000		£85,000	69 gigs			£24,150	100
93	rock	£20 - £30,000		£25,000	20 gigs			£17,500	250
94	Indie	£40 - £50,000		£45,000	23 gigs	£21,658		£20,125	250
95		£10 - £20,000		£15,000	4 gigs			/	/
96	pop	£100 - £150,000		£125,000	11 gigs			£57,250	1500
97		£20 - £30,000		£25,000	18 gigs			£6,300	100
98	pop	£50 - £60,000		£55,000	17 gigs			£14,875	250
99		£50 - £60,000		£55,000	46 gigs	£23,064		£16,100	100
100	rock traditional		£158,467	£158,467	40 gigs	£158,467		£35,000	250
101		Under £9,999		£5,000	6 gigs			£1,050	100
102		£100 - £150,000		£125,000	29 gigs	£230,146		£25,375	250
103		£60 - £70,000		£65,000	31 gigs			£10,850	100
104	pop	£20 - £30,000		£25,000	2 gigs	£10,098		£3,500	500
105	punk	Under £9,999		£5,000	8 gigs			£1,400	50
106	punk	Under £9,999		£5,000	18 gigs			£9,150	50
107	punk	£10 - £20,000		£15,000	32 gigs			£5,600	50
108	Indie	Under £9,999		£5,000	15 gigs			£2,625	50
109	pop	£10 - £20,000		£15,000	43 gigs			£7,525	50
110		Under £9,999		£5,000	8 gigs			£1,400	50
111	Indie	£30 - £40,000		£35,000	31 gigs			£5,425	50
112	pop	£30 - £40,000		£35,000	43 gigs			£7,525	50
113	Indie	Under £9,999		£5,000	16 gigs			/	/
114	Indie	Under £9,999		£5,000	5 gigs			/	/
115	Indie	Under £9,999		£5,000	4 gigs			/	/
116	Indie	Under £9,999		£5,000	7 gigs			£1,225	50
117	rock	£10 - £20,000		£15,000	18 gigs			£3,150	50
118	Indie	Under £9,999		£5,000	8 gigs			£1,400	50
119	Indie	Under £9,999		£5,000	8 gigs			£1,400	50



	Under £9,999		£5,000	10 g#n			£1,750	50
	Under £9,999		£5,000	3 g#n		/	/	/
Funk	£100 - £150,000		£125,000	30 g#n			£52,500	500
punk	£50 - £60,000		£55,000	17 g#n			£14,875	250
indie	Under £9,999		£5,000	4 g#n			£1,400	100
	Under £9,999		£5,000	3 g#n			£1,050	100
pop	£100 - £150,000		£125,000	40 g#n			£35,000	250
punk	£100 - £150,000		£125,000	41 g#n			£143,500	1000
pop	£10,000 - £20,000		£15,000	10 g#n			£1,750	50
	£30,000 - £40,000		£35,000	22 g#n			£7,700	100
	£100 - £150,000		£125,000	31 g#n			£10,850	100
	£20 - £30,000		£25,000	21 g#n			£7,350	100
electronic		£55,809	£55,809			£55,809	/	/
	£100 - £150,000		£125,000	44 g#n			£77,000	500
Jazz	£10 - £20,000		£15,000					
electronic	£20 - £30,000		£25,000	8 g#n				
	£20 - £30,000		£25,000	9 g#n				
	Under £9,999		£5,000	5 g#n				
Folk Singer	£20 - £30,000		£25,000	59 g#n			£10,325	50
Acoustic C&I	£10 - £20,000		£15,000	16 g#n			£11,200	200
Traditional	Under £9,999		£5,000	6 g#n				
Traditional	£100 - £150,000		£125,000	59 g#n			£51,625	250
Traditional	£100 - £150,000		£125,000	64 g#n			£18,800	200
Folk	£150 - £200,000		£175,000	83 g#n			£145,250	500
Folk Singer	£30 - £40,000		£35,000	63 g#n			£11,025	50
Traditional	£20 - £30,000		£25,000	30 g#n			£10,500	100
Traditional	£20 - £30,000		£25,000	14 g#n			£9,800	200
Trad singer	Under £9,999		£5,000	6 g#n				
Folk			£0	0 g#n				
Trad/Folk	£20 - £30,000		£25,000	12 g#n			£8,400	200
Folk	£20 - £30,000		£25,000	43 g#n			£15,050	100
Folk	Under £9,999		£5,000	6 g#n				
Folk	Under £9,999		£5,000	3 g#n				
Folk	£50 - £60,000		£55,000	19 g#n			£33,250	500
Traditional	£70 - £99,999		£85,000	18 g#n			£31,500	500
	Under £9,999		£5,000	2 g#n				
Electronic (DI)	£40 - £49,999		£45,000	16 g#n				
Folk Singer	Under £9,999		£5,000	7 g#n				
Indie	£10 - £20,000		£15,000	19 g#n			£13,300	200
Jazz			£0	0 g#n				
Dance	Under £9,999	0	£5,000	8 g#n				
Indie	Under £9,999		£5,000	8 g#n				
Rock	Under £9,999		£5,000	1 g#n				
pop	Under £9,999		£5,000	21 g#n			£14,700	200
Rock		0	£0	0 g#n				
Grime	Under £9,999		£5,000	10 g#n			£7,000	200
Hip-Hop	Under £9,999		£5,000	7 g#n				
Lo-fi	Under £9,999		£5,000	3 g#n				
Indie	Under £9,999		£5,000	6 g#n				
Jazz	£10 - £20,000		£15,000					
Jazz	Under £9,999		£5,000	5 g#n				
Jazz	Under £9,999		£5,000	8 g#n				
Jazz	£20-30000		£25,000	16 g#n			11200	200
Jazz	Under £9,999		£5,000	1 g#n				
Jazz	Under £9,999		£5,000	4 g#n				
Traditional	£10 - £20,000		£15,000	15 g#n			£10,500	200
Traditional	£10 - £20,000		£15,000	5 g#n				
Traditional	£10 - £20,000		£15,000	13 g#n			£9,100	200
Traditional	£10 - £20,000		£15,000	14 g#n			£9,800	200
Traditional	Under £9,999		£5,000	3 g#n				
Jazz	Under £9,999		£5,000					
Electro	Under £9,999		£5,000	6 g#n			£2,100	100
Rock	£100 - £150,000		£125,000	17 g#n			£66,500	1000
			£17,466,198				£7,218,473	

## Appendix Two – Composers

	A	B	C	D	E
1	<b>Composer</b>		<b>Area of Composition</b>		<b>Notes</b>
2					
3	Rory Boyle		Orchestral, Chamber, Brass, Opera, Vocal, Solo, TV and Films		Professor of composition at the Conservatoire
4					
5	Ross Campbell		TV and Film		Won a bafta in 1996 for a score
6					
7	Philip Clemo		Film and Documentary		
8					
9	Gawain Erland Cooper		TV		Writes for other artists (Paul Weller)
10					
11	Stephen Ferguson		Film		Lives in Vienna
12					
13	Peter Graham		Brass		
14					
15	Neil Grant		Football Anthems		Previously in RAAR
16					
17	Michael Hunter		Computer Games		Grand Theft Auto Theme
18					
19	Barry Leitch		Computer Games		
20					
21	Gillian Maitland		Marimba		Composes sheet music
22					
23	John McLeod		TV and Film		Has a CBE for services to music
24					
25	Paul Mounsey		TV, Film and Adverts		Songwriter too
26					
27	Aidan O'Rourke		2012 Olympic Games		Also been an artist in bands such as Lau and Blazin Fiddles
28					
29	Martin Suckling		Orchestral		
30					
31	Shiori Usui		Classical Music		Originally from Japan
32					
33	Julian Wagstaff		Classical Music, Theatre, Opera		
34					
35	Kenneth Young		Computer Games		
36					
37	Francis McDonald		TV and Film		
38					
39	James Dillon		Choral and Vocal Music		
40					
41	Stuart MacRae		Operas		
42					
43	Matthew Whiteside		Opera, Chamber Music, Music Instalations		
44					
45	James Macmillan		Classical Music		Awarded a CBE
46					
47	Pete Stolley		Electroacoustic Composition		English but now lives in Aberdeen
48					
49	Alistair MacDonald		Electroacoustic Composition		Teaches at the Conservatoire
50					
51	Gemma McGregor		Choral and Instrumental Music		
52					
53	Robert Irvine		Chamber Music		Founded the Chamber Group of Scotland. Works at the Conservatoire
54					
55	Helen Grime		Classical Music		MBE for services to music (YOUNG)
56					
57	Gordon McPherson		Orchestral Music		Head of Composition at the Conservatoire
58					
59	James Staddon		Classical Music		
60					
61	Claire McCue		Chamber, Orchestral, Piano, Voice		
62					
63	Lewis Murphy		Operas		Worked with Fatherson
64					
65	C Duncan		Classical and Modern		Also a prominent Musician
66					
67	Robert Gow		Electroacoustic		
68					
69	Ailie Robertson		Harp		
70					
71	Oliver Searle		Orchestral		Won a British Composer Award 2018 - Co - chair of new music scotland
72					
73	William Sweeney		Orchestral, Chamber, Choral		
74					
75	Alasdair Nicolson		Orchestras, Ensembles, Soloists		
76					
77	Martin Suckling		Orchestral and Ensemble Music		Teaches in York also
78					
79	Anna Meredith		Modern Classical, Experimental		Winner of the Say Award 2016. Nominated for Mercury award. Composer in residence with the Scottish Symphony Orchestra
80					
81	Lyell Creswell		Orchestral, Voice, Opera, Concerto		
82					
83	Matthew Collings		Guitar and Amp		
84					
85	Matthew Whiteside		Opera, Chamber Music		
86					
87	Craig Armstrong		Film Scores, Remixes, Orchestral Music		OBE from Hollywood. Remixes for U2, Massive Attack and thePet Shop Boys
88					
89	Edward McGuire		Opera and Orchestral		
90					
91	Duncan Strachan		Film Scores		
92					
93	Mogwai		Film Scores		Zidane, Les Revenants, Kin, Zero zero zero
94					
95	Emily Doolittle		Opera		
96					
97	Simon Thacker		Classical Guitar		
98					
99	Fergus McCreadie		Jazz		2018 Jazz BBC finalist
100					
101	Calum Wood				Commissioned by Visit Cairngorms
102					

# Appendix Three - Promoters

	A	B	C	D	E	F	G	H	I
1	<b>Live Music Promoters in Scotland</b>		<b>Location</b>	<b>Companies</b>	<b>House</b>		<b>Income</b>		
2									
3									
4									
5									
6	DF Concerts				DF				
7	Regular Music				Tecjet				610,464 - Pollstar - 2018
8	PCL				Autauric				
9	PMCI Events				PMCI Events				
10	Triple G Music				Triple G Music Promoter				
11	Synergy								
12	432 Presents				Arrifana				
13	Jazz Scotland								SCO35566
14	Bridge Jazz								Not for profit
15	PM Music	Ceased							Peter Macalman
16	Sarega								Not for profit - Classical Indian Music
17	Ginger Jesus Promotions	Dougie Black	Dundee						
18	Beyond Presents		Highlands						
19	The Touring Network								
20	Hamilton Hunter (MARK MILLER)				G, E, D, A				
21	CPL	Cathouse / Garage	Glasgow						
22	John Cruickshanks	Beat Generator	Dundee						
23	Cool cat club		Dundee						
24									
25									
26									
									<b>Total Promoter Revenue after costs £15,421,765 (See Chapter five for calculation)</b>

# Appendix Four – Music Venues

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Music Venues	City	Companies	House	Venue	Hire	Total Venue Hire Revenue	Ticket Sales	Sold out	Number of Gigs	Ticket price	Capacity				
6		<u>Glasgow</u>														
9	Barrowlands		Margaret McIvor Limited			£2,000	£150,000	£3,756,775	Sold out 44	75 gigs	£27.50 average	1900				
10	The O2 Academy		Academy Music Group UK			£3,000	£378,000	£5,692,500		126 gigs	£27.50 average	2500				
11	The O2 ABC					£1,200	£34,800	£972,400	Sold out 11	29 gigs	£27.50 average	1300				
12	The O2 ABC2					£200	£13,000			65 gigs		350				
13	The Hydro					£45,000	£2,970,000	£52,047,800	Sold out 35	66 Gigs	Taken a £50 average	13,000				
14	SWG3 Poetry Club					£100	£1,200			12 gigs	£10 average	125				
15	SWG3 warehouse					£1,350	£76,950	£1,710,000		57 Gigs	£30 average	1250				
16	QMU					£1,600	£28,800	£259,200		18 gigs	£20 average	900				
17	King Tut's		Included in DF		In House			£489,600		204 (Average)	Average £10	300				
18	Nice n Sleazy's					£200	£18,000	£97,200		90 gigs	Average £5-£10 - £7.50	180				
19	13th Note		Javacrest Limited			£100	£1,300	44742		113 gigs	Average £6	110				
20	Mono					£200	£3,800	£38,000	See Notes	19 gigs	Average £10	250				
21	Broadcast					£100	£16,400	£209,920	See Notes	164 gigs	Average £10	160				
22	SECC					£45,000		£8,282,250			Average £50	3000				
23	The Cathouse					£200	£3,600	£76,032		18 gigs	Average £16	80%	330			
24	Classic Grand					£450	£20,250	£222,750	See notes	45 gigs	Average £15	60%	550			
25	Old Fruitmarket					£1,350	£37,800	£1,024,800	See notes	28 gigs	Average £30	1525				
26	Royal Concert Hall					£1,350	£82,350	£1,736,670	See notes	61 gigs	Average £30	1186				
27	CCA					£200	£7,200	£125,280		36 gigs	Average £15	290				
28	Kelvingrove Bandstand					£3,000	£36,000	£,216,325	Sold out 8	12 gigs	Actual Prices used	2500				
29	Stanes					£200	£25,600	£368,640		128 gigs	Average £12	300				
30	Saint Lukes					£650	£63,700	£705,600	website archive	98 gigs	Average £15	600				
31	Oran Mor					£650	£69,550	£642,000		107 gigs	Average £15	500 (main room)				
32	The Garage					£650	£91,650	£239,480	Used pollstar figure	141 gigs	Average £20	700 (main room)				
33	Glad Cafe					£100	£8,200	£59,040	see notes	82 gigs	Average £10	60%	120			
34	The Hug and Pint					£100	£16,700	£120,240	see notes	167 gigs	Average £10	60%	120			
35	Hampden				Estimate		£100,000	£13,826,434		4 gigs						
37		<u>Edinburgh</u>														
39	Bannermans					£100	£15,300	£160,650		153 gigs	Average £10	60%	175			
40	Murrayfield				Estimate		£100,000	£6,314,083		1 gig		54,221				
41	Corn Exchange					£4,000	£8,000	£132,000		2 gigs	£27.50	80%	3000			
42	Playhouse					£4,000	£44,000	£1,514,205		11 gigs	£45	90%	3059			
43	Henry's Cellar Bar	FREE	ENTRY			£100	£3,500	//////////		35 gigs		140				
44	La Belle Angelle					£650	£23,400	£345,600		36 gigs	Average £20	600				
45	Sneaky Petes					£100	£18,000	£61,678	Companies house	Average 180		100				
46	Summerhall					£450	£17,550	£312,000		39 gigs	Average £20	500				
47	Bongo Club					£200	£2,000	£24,000		10 gigs	Average £10	300				
48	The Caves					£100	£2,300	£41,400		23 gigs	Average £15	80%	150			
49	Liquid Room					£900	£55,800	£793,600		62 gigs	Average £20	80%	800			
50	Mash House					£100	£7,900	£156,420		79 gigs	Average £11	80%	225			
51	Queens Hall					£1,600	£230,400	£306,130		144 average	Average £27.50	900				
52	Voodoo Rooms					£100	£9,700	£232,000		97 gigs	Average £15	200				
53	Usher Hall					£7,000	£266,000	£2,675,200		38 gigs	Average £40	2200				
56		<u>Fife</u>														
58	Alhambra Theatre					£1,350	£21,600	£448,000		16 gigs	Average £25	80%	1400			
59	PJ Mollis					£200	£9,800	£176,400		49 gigs	Average £15	80%	300			
60	Carnegie Hall					£450	£7,200	£138,240		16 gigs	Average £20	80%	540			
61	Roths Halls					£1,350	£9,450	£235,200		7 gigs	Average £30	1400				
64		<u>Dundee, Aberdeen and Inverness 12</u>														
66	The Church - Dundee					£200	£7,400	£113,960		37 gigs	Average £10	80%	385			
67	Caird Hall - Dundee					£3,000	£24,000	£441,600		8 gigs	Average £30	80%	2300			
68	Fat Sams - Dundee					£450	£3,150	£46,200		7 gigs	Average £15	80%	550			
69	Beat Generator - Dundee					£200	£5,200	£83,200		26 gigs	Average £10	80%	400			
70	The Music Hall - Aberdeen					£1,350	£2,700	£71,750		2 gigs	Average £35	80%	1281			
71	Drummonds - Aberdeen					£200	£17,000	£224,400		85 gigs	Average £11	80%	300			
72	Lemon Tree - Aberdeen					£450	£13,050	£191,400		29 gigs	Average £15	80%	550			
73	Tunnels - Aberdeen					£200	£9,600	£115,200		48 gigs	Average £10	80%	300			
74	Krakatoa				In-House Promoter				Primarily Free Gigs with the Odd Ticketed Event							
75	P and J - Aberdeen		Opened 2019		/	/	/	/	/	/	/	80%				
76	Ironworks - Inverness		Caroline Campbell			£1,350	£56,700	£504,000		42 gigs	Average £15	80%	1000			
77	Mad Hatters - Inverness					£100	£1,500	£9,000		15 gigs	Average £10	80%	75			
81		<u>Additional Cities</u>														
82	Motherwell Town Hall					£1,350	£6,750	£173,250								
83	The Bungalow - Paisley		Billy Kinnear			£200	£10,400	£120,640	Facebook Events							
84	The Tolbooth - Stirling					£200	£3,000	£30,375								
89							<b>£5,277,200</b>	<b>£110,155,459</b>								

# Appendix Five – Music Festivals

	Festival	Source	Income	Funding	Sold Out	Method
3	Belladrum		£2,920,000		Sold out	£146 (3 days) 20,000 - sold out
4	Transmit		£12,500,000			£62.50 x 200,000 - not sold out
5	Hebridean Celtic Festival	Companies House	£416,412	£418,500	Sold out	£93 x 4500 - 16000 over weekend
6	Tiree Music Festival	Companies House	£241,545	£170,000	Sold out	£85 x 2000 - Concessions, under 18s cheaper - might adjust
7	Solas			£97,027		SC041434
8	Rewind	Companies House	£5,580,022	£1,860,674		Three sites - 1 in Scotland. Took 1/3 of the turnover
9	Glasgow Summer Sessions		£5,390,000		Sold out	Calculated ticket price against capacity for each show
10	Loopallu	Companies House	£200,000		Sold out	2500 x £80
11	Knockengoroch	Companies House	£269,055			Companies House - 2700 Capacity
12	Celtic Connections		£2,600,000			130,000 tickets sold. From £11 to £25 Average price of £20
13	Eden Festival		£338,220		Sold out	Different Pricing Tiers
14	Orkney Folk Festival		£150,000			Cherity - SC027280
15	Glasgow International Jazz Festival	Companies House	£39,184			Companies House
16	Montrose Music Festival	Companies House	£42,237			Not for profit. One gig supports the rest of the festival
17	St Magnus Festival	Companies House	£364,759			Companies House
18	Killin Music Festival		£79,000			Get McLaren hall Capacity
19	Electric Fields	Companies House	£960,000			8000 x £120
20	Kelburn	Companies House	£176,540		Sold out	4000 capacity.
21	Butefest	Companies House	£156,450			
22	Speyfest		£92,944			Need More
23	Mugstock		£108,000		1500	<a href="https://www.bbc.co.uk/news/uk-scotland-tayside-central-50855929">https://www.bbc.co.uk/news/uk-scotland-tayside-central-50855929</a>
24	Party at the Palace		£712,000			9000 capacity daily (8000 x £89 weekend passes)
25	Riverside Festival		£700,000			Sunday sold out Sunday - 7000 x £100
26	Lets Rock Festival		£546,000			13,000 x £42
27	EH6 Festival	Companies House	£175,000			5000 tickets sold according to webpage - £35 each
28	Tennement Trail		80,000		sold out	£25 x 3200 (Every venue full is 4000)
29	Doune the Rabbit Hole		£8,000			£80 weekend - 1000 cap a day
30	Millport Country Music Festival		£267,000			3000 capacity £89 weekend
31	Stag and Dagger Festival		30,000			Around 1200 tickets sold - I played the festival
32	Blas Festival			Funded		SC 130071.
33	Edinburgh Tradfest			Funded		80 events in 27 venues
34	Scots Fiddle Festival			£30,511		SC031564
35	Shetland Folk Festival			£158,624		
36	Mull Music Festival			£10,000		SC013445
37	Feis Ile, (Islay)			£35,962		SC004390
38	Oban Live		£376,000			8000 tickets x £47 day ticket
39	Belhaven Riverside Rock Festival		£84,000			Capacity 3500 per day - £30 a ticket
40	Feis an Eilein (SKYE FESTIVAL)					
41	Stonehaven Folk Festival			£47,894		
42	Eilein Dorcha Festival	Companies House	£28,503			
43	Ceol Cholas		£25,000			250 x £100 (festival pass)
44	Jura Music Festival			£41,700		SC026893
45	Feis na Mara			£16,561		SC027661
46	SEALL Festival of Small Halls			£123,903		SC024859
47	Denholm Folk Festival			Free Festival		
48	Inverness Fiddlers Rally			£9,131		SC015759
49	Highlands and Islands Music and Dance Festival			£42,420		SC010287
50	Moniaive Folk Festival			£7,920		180 capacity (144) 3 concerts (£15, £20 and £20)
51	Niel Gow Festival		£10,000			175 cap venue over 3 days. (80% = 140). £15 a ticket Smaller venues £10
52	Strichen Festival				Free festival	
53	HAAL Festival			£10,760		SC044610
54	Arran Folk Festival		£6,400			200 cap gigs (160 tickets at 80% - 2 gigs
55	TMSA Keith Festival			£151,747		SC003819
56	Newton Stewart and Minnigaff Traditional Music and Dance Festival		£36,120			7 gigs - 430 capacity (344 @ 80%) - Average £15 a ticket
57	Ardersier Folk Festival		£6,600			150 capacity (120) x £55 (£25, £20 +£10)
58	Marymass Folk Festival		£5,632			2 gigs (220 cap - 176 @80%) - Ticket £16.
59	Leadhills Music Festival		£8,640			240 cap (192 @80%) - £15 ticket - 3 shows
60	Fiddler of Strathspey Festival		£0			Free festival
61	Skye Accordion and Fiddle Festival		£960			Capacity - 80 / 3 gigs / £4
62	Glasgow International Piping Festival			£192,793		SC034875
63	Dunbar Traditional Music Festival				Free festival - donations	
64	Queensferry Annual Folk Festival		£4,380			SC047120
65	Jazz Scotland	Aberdeen, Islay, Dundee		£212,052		SC035566
66	Lomond Folk Festival			£0		SC040537
67	Glasgow Americana Festival		£26,808			
68	Edinburgh Jazz and Blues Festival			£80,000		
69	Speyfest			£92,944		SC046959
70						
71			£31,972,606	£1,361,949		
72						
73	Total Income		£33,334,555			

# Appendix Six – PA, Stage and Lights

Company Name	Location	Income	Estimations
Stage Hire Scotland	Glasgow	£211,248	
A&L B	Glasgow (English based head office)		
Apek Acoustics	Dundee	£145,279	
Audio CP	Glasgow	£33,509	
DM Audio Limited	Edinburgh	£179,298	
EH Sound	Glasgow	£1,542	
F.E Live Audio	Glasgow	£241,923	
Live Systems Limited	Edinburgh	£167,062	
Precise Audio Limited	Glasgow	£80,857	
Sight and Sound PA and Lights	Falkirk	£1,549	
Smart PA	Edinburgh	£134,075	
Sound Acoustic Productions Limited	Glasgow	£48,412	
The Warehouse Sound Services Limited	Edinburgh	£4,228,490	
GBR Technical Services	Glasgow	£18,130	
Black Box Pro Audio	Glasgow	£24,366	
ALive Sound Ltd	Glasgow	£103,551	
Edinburgh Showtec	Edinburgh	£126,191	
The Stage Group Limited	Glasgow	£21,134	
Scots Event Services	West Lothian	£80,898	
Glasgow Stage Crew	West Lothian	£2,276	extended to mid 2019
Mad Crew	Glasgow	£5,091	
Edinburgh Showtec	Edinburgh	£126,191	
Security Scotland Limited	Glasgow	£474,485	
Rock Steady Security	Glasgow	£156,470	
Specialised Security	Livingston	£268,427	
Power House Pro Audio			£50,000
atech sound and light	Dundee		£100,000
Flashlike	Glasgow	£450,000	
		<b>£7,396,606</b>	<b>£150,000</b>

# Appendix Seven – Ticketing

	A	B	C	D	E
1			<b>Income</b>	<b>Notes</b>	
2					
3	Tickets Scotland		£401,432		
4					
5	Gigs in Scotland			Owned by DF	
6					
7	Tickets Glasgow			Ran by Glasgow Life	
8					
9					
10	Festivals Ticketing Revenue - £3,333,455				
11	Gig Ticketing Revenue - £11,015,546				
12					

# Appendix Eight – Record Companies

	Median	City	Genre	Medium	Information
1					
2					
3					
4	£175,000	Glasgow	Rock / Indie	Physical and Digital	Mogwai founded label
5	£50,000	Glasgow	Rock / Indie	Physical and Digital	Delgados founded label
6					
7					
8	£90,000	Glasgow	Dance		Slam
9					
10	£5,000	Elgg	Various		Johnny Lynch - Ex Fence Records
11					
12	£15,000	Glasgow	Trad		Capercaille
13					
14	£5,000	Glasgow	Indie - Rock		College Label
15					
16	£50,000	Glasgow	Dance		Jack "Jackmaster" Revill
17					
18	£5,000	Glasgow	Rock / Indie		
19					
20	£5,000	Edinburgh	Indie		Ended in 2018 - Matthew Young
21					
22	£5,000	Edinburgh	Dance		Lindsay Todd
23					
24	£50,000	Glasgow	Dance		January 2009 - Label
25					
26	£5,000	Edinburgh	Indie	Vinyl and digital	April 2010 by childhood friends Paddy Berry and Andy Lobban
27					
28	£30,000	Glasgow	Classical and Jazz		
29					
30	£5,000	Glasgow	Indie		Halina rafal
31					
32	£5,000	Glasgow	Indie	Vinyl	Labour of love - Le Ren Amps Founders
33					
34	£5,000	Glasgow	Rock / Indie		Not for profit
35					
36	£5,000	Edinburgh	Classical		Paul Baxter Kevin Findlan
37					
38	£15,000	Edinburgh	Trad Music		
39					
40	£15,000	Edinburgh	Jazz		
41					
42	£5,000	Edinburgh	hip hop to art-rock		Scott MacDonald
43					
44	£5,000	Glasgow	Reggae		
45					
46	£5,000	Glasgow	Dance		Fergus Clark
47					
48	£5,000	Glasgow			
49	£0	London (office in Edinburgh)			Music and Art (Hudson Mohawke)
50					
51					
52	£15,000	Edinburgh	Trad and Folk		Sandy Brechin
53					
54	£15,000	Edinburgh	Trad		Founded in 1978 - Robin Morton
55					
56	£5,000	Edinburgh			Jeremy Thoms
57					
58	£5,000	Edinburgh	Scottish		Compilation Albums
59					
60	£5,000	Glasgow / Carlisle		Cassette only	Gus Stephens
61					
62	£5,000	Glasgow	hardcore - metal		Ross Wilson, Andrew Wilson
63					
64	£5,000	Glasgow	Punk / Emo / Hardcore		Not for Profit
65					
66	£5,000	Glasgow	Various	Vinyl / Tape / CD	Label and Management
67					
68	/	Edinburgh			2019
69					
70	/	Glasgow / Edinburgh			2019
71					
72	£5,000	Glasgow	Indie	Vinyl	Douglas McIntyre
73					
74	£5,000	Glasgow	Indie / Rock		
75					
76	£30,000	Glasgow	Trad / Folk		Graham Collins of "Threads of Sound"
77					
78	£175,000	Glasgow	Acoustic		Gery Cinnamons Label
79					
80	£30,000	Dundee	Dance		
81					
82	£5,000	Glasgow	Eclectic		Garry John Kane
83					
84	£15,000	Ayr	Dance		Mark Sherry
85					
86	£15,000	Glasgow	Trad		Skerryvore
87					
88	£5,000	Scotland	Dance	Digital	
89					
90	£5,000	Glasgow/Inverness	Electronic		Ran by Debukas and his brother
91					
92	£5,000	Erskine	Techno		2010
93					
94	£5,000	Glasgow	Techno		Sigmatron
95					
96	£15,000	Stornoway			Peat and Diezel - Astrid
97					
98	£5,000	Skye			Peatbog and Fairies Label
99					
100	£5,000	Newton Stewart			Steve Dowling
101					
102	£15,000	Beaulieu	Trad and Folk		William Crawford
103					
104	£5,000	Glasgow		Vinyl	Francis McDonald
105					
106	£15,000		Trad	CD	
107					
108	£15,000	Wick	Trad and Folk		Research more
109					
110	£5,000		Electronic		
111					
112	£5,000	Aberdeen			
113					
114	£5,000	Highlands			
115					
116					
117	£995,000				
118					



Appendix Nine - Distribution

	A	B	C	D	E	F	G	H	I	
1			<b>City</b>		<b>Medium</b>		<b>Income</b>		<b>Details</b>	
2							[REDACTED]			
3										
4	Emu Bands		Glasgow		Digital					Ally Gray
5										
6	Birnam CD		Perth		Digital / CD / Vinyl					Martin Hadden
7										
8	Threads of Sound		Glasgow		Digital				Graham Collins	
9										
10	Glasgow Tapes		Glasgow		Cassette				ESTIMATE	
11										
12										
13										
14							£658,723			

# Appendix Ten – Recording Studios

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
		Median	No. studios		Day Rate		Projected Earnings		City		Companies House		Engineer / Producer	
							Day rate x 261 days (UK Music estimation)							
									Glasgow - 35					
6	Gargleblast Studios	£25,000	1..		M-F £150 / 5+5 £200		£42,550						Shaun Tallamy - Andy Miller	
8	Gorbals Sound	£15,000	3..		Studio 1 £540 - 2 - £250 - 3 - £100		£232,290				£16,586		Kevin Burleigh	
10	45 a side recording	£40,000	1..		£280 pd		£73,080				£45,533		Paul McNally	
12	La Chunky	£60,000	1..		£250		£65,250						Johnny Smillie - Ronan Breslin - Colin McGeoch - Barry Reid - Ben Brown - Ewan Grant	
14	Maybank studios	£15,000	2..		£200		£52,200						Matt Harvey	
16	Carlton Studios	£2,500	1..		£25ph		£45,675				£4,244		Jamie Telford - Gareth James	
18	Stealth Recording Studio	£2,500	1..		£200		£52,200						Eddie MacArthur	
20	Green Door Studios	£40,000	1..		£180		£46,980				£35,148		Samuel J Smith - Ronan Fay - Emily McLaren - Stuart Evans	
22	Chem 19	£60,000	2..		Studio1 £350, Studio2 £200		£143,550				£63,562		Paul Savage - Dave Muley - Derek O'Neill - Jamie Savage	
24	Glow worm recording	£7,500	2..		Studio 1 £200, Studio 2 £100		£78,300				£5,580		Andrea Gobbi	
26	Head hunter studios	£15,000	1..		£200		£52,200						Donaldo MacDoogle	
28	Green Room Studios	£15,000	1..		£300		£78,300							
30	7 west studios	£60,000			£220		£57,420						Chris Marshall	
32	castle of doom	£25,000	1..		£300		£78,300				£25,294		Tony Dougan	
34	Anchor lane studio	£15,000	1..		£180		£46,980						Luigi Paolini - Omar Aborida	
36	Dystopia Studios	£7,500	1..		£180		£46,980						Luigi Paolini (Owner)	
38	16 Ohm Recording Studio	£7,500	1..		£120		£31,320						Tommy Duffin	
40	Chime Recording Studio	£15,000	1..		£200		£52,200						Ross McGowan	
42	White Room Audio Recording	/			£120		£31,320				/		NEW 2020 - Run by Innes Little and Kira Marshall, graduates from SAE	
44	Fusion Studios	/			£120		£31,320				/		New 2020 - Run by Robert Douglas Rae	
46	CaVa Studios	£25,000	1..		£250		£65,250							
48	Rocket Science Studios	£25,000	1..		£150		£39,150						Ross Hamilton - Jamie McGrory	
50	Matchbox Sound	£15,000	1..		£160		£41,760						Ciárdán McIntyre	
52	Venice of the North Recording Studios	£2,500	1..		£180		£46,980				£756			
54	Underworld Studio	£15,000	1..		£50ph		£91,350						Kenny Inglis	
56	Red Eye Studios	£15,000	1..		£120		£31,320						Alan Bishop	
58	Subzero Recording Studio	£15,000	1..		£640 (includes mix and master)		£23,680						Murray Paul	
60	Pauls Halls Recording	£25,000	1..		£35ph		£63,945							
62	Titan Studios West		1..	£1600 x 37	Mon - Th £220, Fri-Sun £240		£59,200							
64	HQ Glasgow Recording Studio		1..	£1600 x 37	Mon - Fri £220, Sat +Sun £250		£59,200							
66	Urban Studios		1..		£180		£46,980							
68	Park Lane				£250		£65,250							
70	Q10 Studios (old bell)				£150		£39,150							
72	The Audio Lounge				£25ph		£45,675							
74	Nova Sound				£150		£39,150						Audrey Tait	
79									Edinburgh - 20					
81	Chamber studio	£2,500	2..		Studio A £400, Studio B £275		£176,175				£56		Michael Street - Niall Sindair - Graeme Young	
83	Offbeat recording studio	£7,500	1..		£45ph		£82,215						Iain McKinna	
85	The noisefloor	£7,500	/		£120		£31,320						Dave House (Owner)	
87	Castlesound	£2,500	1..		£550		£143,550				£940		Stuart Hamilton	
89	21 seven	£15,000	1..		£200		£52,200						Andrea	
91	Post electric studio	£2,500	2..		£350		£91,350				£3,628		Rod Jones - Kris Pohl	
93	Sound Sound	£25,000	1..		£280		£73,080						Hamish Campbell	
95	Anvil Studio	£15,000	1..	£1765 x 37	M-F £235, 5+5 £285		£65,305						Terry Stevens	
97	Black Cave Recordings	£15,000	1..		£150		£39,150						Andrew Rankine	
99	Wall of sound recording	£7,500	1..		£250		£65,250						Stuart Gordon	
101	Finiflex	£40,000	1..		£120ph		£219,240				£43,646		John Vick	
103	Banana row studios	£40,000	1..		£200		£52,200				£44,605		Cragie Hunter	
105	Tape Studios	£85,000	1..		£150		£39,150				£94,767		Stephen Watkins	
107	Groove Tunnel	£25,000	1..	£1365 x 37	£25 ph M-F, £35ph 5+5		£50,505						Rod Spark	
109	swabfield studios	£7,500	1..		£150		£39,150							
111	Tonegarden Music Studios		1..		£150		£39,150							
113	Mark Morrow Audio		1..		£200		£52,200							
115	The Depot Recording Studio		1..		£225		£58,725							
117	Lost Oscillation Recording Studio		1..		£210		£54,810							
119	The Sonic Lodge		1..		£120		£31,320							

125									<b>DUNDEE - 9</b>			
126												
127	Seagate Studios	£15,000	1.		£25ph	£45,675						Mike Brown
128	Dundee Music Studios	£25,000	1.		£120	£31,320						Steve Laing - Ryan Shepherd
130	Lion Studio	£15,000	1.		£150	£99,150						Arkadiusz Dziurzynski
132	Red Barn Studios	£7,500	1.		£240	£62,640		£5,396				Stuart Duncan
134	Strait up studios	£15,000	1.		£20ph	£36,540						Stephen Zelenka
137	Stage 2000	£2,500	1.		£120	£31,320		£484				Jeff Findlay
138	Magic Box Collective	£15,000			£150	£99,150						Scotty Anderson
140	Gardyne Theatre Recording Studio	£7,500			£30ph	£54,810		/				Chris Kydd
142	Planet Studio		1.		£20ph	£36,540						
144												
145												
146												
147									<b>Inverness - 4</b>			
148	The Music Shed	£15,000	1.		£20ph	£36,540						Dave Sidley
149												
150	The Byre Recording Studio	£2,500	1.		£350	£91,350		£1,023				Andrew Graeme
151												
152	Watercolour Studios	£25,000	1.		£350	£91,350						Nick Turner
153												
154	UnityRecording Studio	£15,000	1.		Contacted				Voiceover	?		Joe Harfield
155												
156												
157												
158	Musical Vision	£2,500	1.		£30ph	£54,810		£883				Robert Joiner
159												
160	O-Range	£15,000	/	/		No longer recording						Jonny Lees - Calum Farquhar
161												
162	Captain Toms	£7,500	1.		£150	£39,150		£5,480				Paul Emerson
163												
164	ARC studios	£15,000	1.		£26ph	£47,502						Gavin Sutherland
165												

166												
167												
168	Eggman Studios	£15,000	1.		£150	£39,150	Dunfermline	/				Darren Forbes
169												
170	Black Bay Recording Studio	£25,000	1.		£400	£104,400	Great Bernera					Pete Fletcher
171												
172	Wee Studio	£15,000	1.		£36ph	£65,772	Isle of Lewis					Keith Morrison
173												
174	RedRock Recording Studio	£7,500	1.		£150	£39,150	Lossiemouth					Will
175												
176	The Cottage Residential Music Studio	£15,000	1.	£760 x 37 weeks	Sun - Th £100, Fr + Sat £130	£28,120	Cairndow					Craig McIntyre - Residential
177												
178	Homegrown Productions Recording Studio	£85,000	1.		£30ph	£54,810	Falkirk	£85,337				
179												
180	Loopmaniac	£15,000	1.		£150	£39,150	Dunfermline					Uam Saunders
181												
182	EFR Studios	/	1.		£150	£39,150	Kirkcaldy					
183												
184	S9Rty Recording	£15,000	1.		£30ph	£54,810	Glenrothes					
185												
186	Tipot Studios	£25,000	1.		£250	£65,250	ForganDenny					Robin Evans - Residential Studio
187												
188	Clearwater Studios	£7,500	1.		£240	£62,640	Perth					Gavin and Fiona Munro
189												
190	Floortom Studio	£15,000	1.		£35ph	£63,945	Durie					Steve Curtis
191												
192	Shirehouse Studios	£15,000	1.		£150	£39,150	Kilmarnock					
193												
194	Sound Magic Music Studios	£7,500	1.		£150	£39,150	Ayr	£50				Ally Smith
195												
196	Arthouse 16A	£25,000	1.		£20ph	£36,540	Castle Douglas	£21,014				
197												
198	Circa 16 Sound Recording	£25,000	1.		£200	£52,200	Dumfries					Dave Miller
199												
200	Lovers Lane Recording Studio	£15,000	1.		£24ph	£43,848	Dumfries					Grant Henderson
201												
202	Mix to Master	£2,500	1.		£19.99 a track		Hawick					Steve Murray
203												
204	Sound Station Recording Studio	£7,500	1.		£250	£65,250	Galaahiel					Mark Sturges
205												
206	The Lane Recording Studio	£15,000	1.		£25ph	£45,675	Preston Pans					Colin Findlay George Logan
207												
208	Heartbeat Recording Studio	£15,000	1.		£250	£65,250	North Middleton					David Valentine

209												
210	An Tobar	£25,000			£200	£52,200	Mull					
211												
212	St Marys Space	£25,000	1.		£250	£65,250	West Highlands					
213												
214	Mareel				£200	£52,200	Shetland					
215												
216												
217												
218												
219						£5,503,407						
220												
221												
222												

## Appendix Eleven – Record Producers

	A	B	C	D	E	F	G	H	I	J	K	L
1			Genre		Location		Artists		Income			
2												
3												
4	Stuart Crichton		Pop		Los Angeles		Backstreet Boys, Keshha, Chainsmokers					
5												
6	Iain Cook		pop / indie		New York						Chvrches	
7	Martin Docherty		pop / Indie		New York						Chvrches	
8												
9	Tony Doogan		pop / indie		Glasgow		Belle and Sebastian, Mogwai				Castle of Doom	
10												
11	Calvin Harris		Dance		Los Angeles							
12												
13	Howie B		Dance / pop / rock		London		U2 - Bjork - Trcky					
14												
15	Calum Malcolm		pop		Edinburgh		Josef K - Simple Minds - Wet wet wet					
16												
17	Rodaidh McDonald		Indie / Rock		Los Angeles		The XX - Savages - Daughter					
18												
19	Andy Miller		Indie / Rock		Hamilton		Mogwai - Arab Strap - Delgados				Gargleblast	
20												
21	Nasty P (Paul Rutherford)		Hip Hop		Edinburgh							
22												
23	Show N Prove (Ellis Taylor)		Hip hop /		London		Rizzle Kicks - Tinchy Stryder - Wretch 32					
24												
25	SOPHIE		Pop		Los Angeles		Madonna - Charlie xcx -					
26												
27	Steg G (Steven Gilfoyle)		Hip hop		Glasgow							
28												
29	Wuh Oh (Peter Ferguson)		Pop / Dance		Glasgow						Signed to Universal	
30												
31	Andrea Gobbi		Trad		Glasgow		Ross Ainslie - Laki Mera					
32												
33	Chris Marshall		Indie / Rock		Glasgow		Gery Cinamon - Baby Strange - The Dunts					
34												
35	Darren Forbes		Indie / Rock		Fife		(Shambolics) - EGGMAN STUDIOS					
36												
37	Norman Blake		Indie / Rock		Ontario		Tennage Fanclub					
38												
39	Kevin Burfeigh		Indie / Rock		Glasgow		simple minds - supernaturals - (GORBALS SOUND)					
40												
41	Paul Savage		Indie / Rock		Glasgow		Delgados - camera obscura - Twilight Sad - (CHEM19)					
42												
43	Johnny Smilie		Indie / Rock		Glasgow		La Chunky					
44												
45	Collin McGeoch		Indie / Rock		Glasgow		La Chunky					
46												
47	Barry Reid		Trad		Glasgow		La Chunky - Talisk, Treacherous Orchestra,					
48												
49	Jamie Sith		Mix of Genres		Oban		St Manys (Miloco client)					
50												
51												

# Appendix Twelve – Instrument Retail

	A	B	C	D	E	F	G	H	I
1	Store		Median		City		Income (Companies House)		Information
2									
3	<b>SIC Code 32200</b>								
4									
5					<b>Glasgow</b>				
6									
7									
8	Guitar Guitar		£13,000,000						7 stores in the UK. 3 in Scotland - £30,541,829 divided 7 x 3
9									
10	Kennys Music		£700,000						3 stores in Scotland
11									
12	Merchant City Music		£700,000						
13									
14	Strungout Guitar		£75,000						
15									
16	CC Music		£75,000						
17									
18	Jimmy Egypt		£125,000						
19									
20	Biggars Music		£125,000						Moved from Sauchiehall st to Buchanan Galleries - SHEET MUSIC
21									
22	Drum Shop Glasgow		£25,000						CLOSED - took first 3 months of 2018
23									
24	Band Supplies Glasgow		£1,000,000						Student rental - service and repairs (brass, woodwind etc)
25									
26	DK Classical Guitars		£25,000						
27									
28	Glasgows Violin Shop		£75,000			/			Sales and Repairs
29									
30	Haydock Music		£475,000						
31									
32	McLarens Pianos		£275,000						
33									
34	Contemporary Violins		£25,000						
35									
36	The Saxophone Shop	/				/			Owned by band supplies Glasgow
37									
38	Village Music		£75,000		Cumbernauld				
39									
40	Signal Sounds	/				/			New Company - 2019-2020
41									
42	Scott Currie Music		£75,000		Bellshill				
43									
44	The Music Centre		£75,000		Paisley	/			
45									
46	Southside Music		£25,000		Govanhill	/			No website photos
47									
48	Accordian.co.uk		£25,000			/			
49									
50	P S Pianos		£75,000		Paisley	/			
51									
52	Alba Musick	/				/			Sheet Music - Owned by Robert Lay
53									
54	Drummers Only		£275,000						Rhythm Base
55									
56	Roddy Macleod Bagpipes		£25,000						
57									
58	Wallace Bagpipes		£125,000		Paisley				
59									
60	DB guitars		£25,000		Coatbridge				New
61									
62	The Guitar Factory		£125,000						
63									
64	Guitar Direct		£25,000						Ceased, April 1st 2018
65									

68						
69						
70				<b>Edinburgh</b>		
71	Guitar Guitar	/			/	See Glasgow
72						
73	Scayles Music	£125,000			/	Traditional shop with repairs
74						
75	Varsity Music	£75,000				Guitar
76						
77	The Wind Section	£175,000				
78						
79	Rikkis Guitar Shop	£25,000				Mix
80						
81	Rae Macintosh Musicroom	£75,000			/	Dormant Company (checked previous years)
82						
83	Stringers of Edinburgh	£900,000				Violin
84						
85	Tim Right Fine Violins	£25,000				
86						
87	Edinbodhran	£25,000			/	
88						
89	Simpsons Guitars	£25,000			/	Online retail of accessories
90						
91	Bagpipes Galore	/			/	Based within Varsity Music Store
92						
93	Banana Row Music	£25,000				
94						
95	Premier Reeds by Lumsden	£25,000			/	
96						
97	Edmondson Pianos	£75,000				
98						
99	Newlands Pianos	£125,000			/	
100						
101	Makin Pianos	£175,000				Juicy Flutes
102						
103	Rimmers Music	£325,000				6 stores in the UK - 1 in Edinburgh - values shown is 1/6
104						
105	Red Dog Music	/			/	Administration - 2018
106						
107	Hobgoblin Music	£175,000				9 UK stores, 1 in Edinburgh. Values shown is 1/6
108						
109	Westwell bagpipes	/			/	New 2019
110						
111						
112						
113						
114						
115						
116						
117						
118	Kennys Music	/			/	
119						
120	Vintage Strings	£75,000			/	
121						
122	Rainbow Music	£75,000				
123						
124	Chalmers (Guitar Centre)	£25,000			/	
125						
126	Music Room	/			/	Sheet (part of Kennys)
127						
128						

130						
131				<b>Aberdeen</b>		
132						
133	Ram Jam Music Co	£125,000				
134						
135	Kennys Music Aberdeen	/				See other Kennys
136						
137	Top Note	£25,000			/	
138						
139	String Studio	£25,000			/	
140						
141	Gordon Bell Pianos	£125,000				
142						
143	R G Lawrie Bagpipe Makers	£25,000				
144						
145						
146						
147						
148	The Music Shop	£125,000				
149						
150	Ness Music Ltd	£25,000				
151						
152	Cabar Feidh Bagpipe Supplies	£125,000			/	Only bagpipe supplies in the highlands
153						
154						
155						
156						
157	Sound and Vision	£225,000		Elgin		
158						
159	Ayr Guitar	£75,000		Ayr	/	
160						
161	The Music Room	£25,000		Irvine		
162						
163	Village Music	£75,000		East Kilbride		
164						
165	The Music Centre	£75,000		Hamilton		
166						
167	John Douglas Music	£25,000		Dumfries	/	
168						
169	Rainbow Music	£75,000		Carlisle	/	Dormant company
170						
171	SkyLine Guitars	£75,000		Annan	/	
172						
173	World Rhythm Percussion	£25,000		Moffat	/	
174						
175	The Wee guitar shop	£175,000		Selkirk		
176						
177	Arcadia Music	£25,000		Biggar		
178						
179	Lock Stock an Barrel	£25,000		Dunoon	/	
180						
181	Highland Drum Major	£25,000		Alexandria		

182						
183	Music Spot	£75,000	Stirling			
184						
185	Joanies Music	/	Stirling	/		New 2019
186						
187	Wall to Wall Music	£75,000	Livingston			
188						
189	SN Percussion	£25,000	Livingston			
190						
191	dD drums	£75,000	Falkirk	/		
192						
193	Kennys Music	/	Dunfermline	/		See kennys Glasgow
194						
195	Varsity Music	£75,000	Inverkeithing	/		
196						
197	Gitturz Inc	£25,000	Dunfermline	/		
198						
199	Forth Music	£25,000	Kirkcaldy			
200						
201	Barnes Hain Bagpipe Reeds	£25,000	Leven	/		no website
202						
203	Unique Guitars	£75,000	Markinch	/		
204						
205	Morrison Guitars	£75,000	Arbroath			
206						
207	Celtic Chords	£75,000	Stonehaven			
208						
209	Fuller Music	£25,000	Kingussie	/		Sheet Music Alone
210						
211	Violins Etc	£75,000	Thurso	/		
212						
213	Pentland Music	£25,000	Thurso	/		
214						
215	The Music Room	£25,000	Irvine			
216						
217	Burgess Bagpipes	£25,000	Forress			
218						
219	Cross Bagpipes	/	Clackmannan			New in 2020
220						
221	Achiltibule Bagpipe Specialists	£25,000	Falkirk			
222						
223	Chris armstrong bagpipe products	£25,000	Falkirk			
224						
225						
226						
227						
228						
229						
230						
231						
232		£22,575,000				
233						

### Appendix Thirteen – Instrument Makers and Repairs

	A	B	C	D	E	F	G	H	I	J	K	L	M
			<b>Instrument</b>		<b>Location</b>		<b>Staff</b>		<b>Median</b>		<b>Companies House</b>		
1													
2													
3	Colin Adamson		Violin		North Berwick				£25,000				
4	Euan Cattanach		Banjo, Guitar, Violin		Aberfeldy				£25,000				
5													
6	Tom Murray		REPAIRS - stringed instruments		Perth								
7													
8	The Guitar Workshop		Acoustic Guitars (Luthier)		Glasgow				£40,000				
9													
10	Flynn Amps		REPAIRS - Guitar and Amp		Glasgow								
11													
12	Strung Out Guitar		REPAIRS - amp and guitars		Glasgow								
13													
14	Jimmy Egypt		REPAIRS - amp and guitars		Glasgow								
15													
16	Band Supplies Glasgow		REPAIRS - Brass and Woodwind		Glasgow								
17													
18	Moon Guitars		Luthier - Guitars		Glasgow (now Arran)				£100,000				
19													
20	Devine Guitar Repair		REPAIRS - Guitar		Glasgow								
21													
22	Bowers Violins		BUILT and REPAIRS - Violins		Edinburgh				£25,000				
23													
24	Neil McWilliam Violins		BUILT and REPAIRS - Violins		Edinburgh				£25,000				
25													
26	Kilberry Bagpipes		Bagpipes		Edinburgh				/			2018 - striking off now	
27													
28	R G Lawrie Bagpipe Makers		Bagpipes		Aberdeen				£65,000				
29													
30	McCallum Bagpipes		Bagpipes		Ayr				£400,000			Factory production	
31													
32	Stirling Bagpipes		Bagpipes		Stirling				£25,000				
33													
34	Caroline Campbell		Violins		Cupar				£25,000				
35													
36	Henderson Reed Makers		Reeds		Kirriemuir				£25,000				
37													
38	Manfini Accordians		Accordians		Tillicoultry				£25,000				
39													
40	Vanden Guitars		Guitar		Argyll				£40,000				
41													
42	Standby guitars		Guitar Stands						£10,000				
43													
44	Devine Guitar Repairs		REPAIRS - guitars		Glasgow								
45													
46	Claffey Guitars		Guitars		Glasgow				£25,000				
47													
48	Epipes		Bagpipe Plugins		Glasgow				/				
49													
50													
51	McIntyre Guitars		Guitars built and repairs		Edinburgh				£40,000			High end Clients	
52													
53	The Fiddle and Guitar Shop				Fintry		2		£40,000				
54													
55	Taran Guitars				Pittenweem		2		£65,000			Rory Dowling	
56													
57	Aylward guitars				Aberlour				£25,000			Guitar	
58													
59	Burgess Bagpipes		Manufacture		Invermess				£25,000				
60													
61	LIDDELL BAGPIPES LIMITED		Manufacture		Fife				25,000				
62													
63							Total		£1,100,000				
64													
65													



Appendix Fourteen – Record Stores

	A	B	C	D	E	F	G
1	<b>Record Shops</b>		<b>Median</b>		<b>Location</b>		<b>Income</b>
2							
3					<b>Edinburgh</b>		
4							
5	HMV			£19,500,00			
6							
7	Underground Solu'shn		£90,000				
8							
9	<b>Coda Music</b>	/					
10							
11	FOPP			£6,000,000	3 stores		
12							
13	VoxBox		£50,000				
14							
15	Oxfam Music		£30,000				
16							
17	Vinyl Villains		£30,000				
18							
19	Elvis Shaespeare		£30,000				
20							
21	Backbeat Records		£30,000				
22							
23	<b>Hogs Head</b>	/					
24							
25	<b>Record Shak</b>	/					
26							
27	Assai Records		£465,000		Dundee too		
28							
29	Unknown Pleasures		£70,000				
30							
31	<b>McAlister Matheson Music</b>	/					
32							
33							
34					<b>Glasgow</b>		
35							
36	Monorail Records		£90,000				
37							
38	Rubadub Records		£50,000				
39							
40	Love Music		£175,000				
41							
42	LP Records		£50,000				
43							
44	Mixed up Records		£50,000				
45							
46	FOPP	/					
47							
48	Oxfam Music		£10,000				

50	Missing Records		£30,000	
51				
52	Ply it again Records		£30,000	
53				
54	<b>Lost Chord</b>	/		
55				
56	The new hellfire club music shop		£10,000	
57				
58	<b>Volcanic Tongue</b>	/		
59				
60	Record Fayre		£30,000	
61				
62	Otherside		£30,000	
63				
64	Mostly Vinyl Micky		£30,000	
65				
66	Some Great Reward		£30,000	
67				
68	Palais De Dance		£30,000	
69				
70	Mostly Vinyl Mick		£30,000	
71				
72				<b>Dundee</b>
73				
74	Grouchos (now Thirteen Records)		£70,000	
75				
76	Assai	/		
77				
78	Le Freak		£50,000	
79				
80				<b>Aberdeen</b>
81				
82	Spin Records		£30,000	
83				
84	Maidinvinyl		£50,000	
85				
86	Chameleon		£10,000	
87				
88	<b>One up Records</b>	/		
89				
90	All Celtic Music		£30,000	

92				<b>Elsewhere</b>
93				
94	Feel the Groove		£50,000	Paisley
95				
96	Europa Music		£90,000	Stirling
97				
98	Rare Trade		£30,000	Kilwinning
99				
100	<b>Big Sparra Vinyl</b>	/		<b>Ayr</b>
101				
102	Concorde Records		£50,000	Perth
103				
104	Mo Fidelity		£50,000	Montrose
105				
106	Union Vinyl		£50,000	Inverness
107				
108	Barneys Spin Vinyl and Retro Games		£50,000	Inverness
109				
110	The Vinyl Café		£50,000	Carlisle
111				
112	Music Scotland		£50,000	Oban
113				
114	Low Port Music		£50,000	Linlithgow
115				
116				
117			£2,130,000	
118				

## Appendix Fifteen – Creative Scotland Regular Funding

	A	B	C	D	E	F	G
	Organisation	Artform	Regular Funding Awarded - 3 years (£)	Regular Funding Awarded - 1 year average (£)	Regular Funding received 15-18 (£)	Local Authority (based on applicant address)	Website
1							
2	21CC (21 Common)	Dance	245,972	81,991		Glasgow City	<a href="http://www.21common.org">www.21common.org</a>
3	A Play, A Pie and A Pint (Glasgow Lunchtime Theatre)	Theatre	450,000	150,000	450,000	Glasgow City	<a href="http://www.playpiepint.com">www.playpiepint.com</a>
4	Aberdeen Performing Arts	Multi	1,000,000	333,333	1,000,000	Aberdeen City	<a href="http://www.aberdeenperformingarts.com">www.aberdeenperformingarts.com</a>
5	Alchemy Film and Arts	Screen	348,462	116,154		Scottish Borders	<a href="http://www.alchemyfilmfestival.org.uk">www.alchemyfilmfestival.org.uk</a>
6	An Lanntair	Multi	1,210,000	403,333	1,210,000	Na h-Eileanan Siar	<a href="http://www.lanntair.com">www.lanntair.com</a>
7	Arika	Multi	600,000	200,000	600,000	City of Edinburgh	<a href="http://www.arika.org.uk">www.arika.org.uk</a>
8	Arts and Business Scotland	Creative Industries	600,000	200,000		City of Edinburgh	<a href="http://www.aandbscotland.org.uk">www.aandbscotland.org.uk</a>
9	ATLAS Arts	Visual Arts	450,000	150,000	450,000	Highland	<a href="http://www.atlasarts.org.uk">www.atlasarts.org.uk</a>
10	Barrowland Ballet	Dance	604,845	201,615	420,000	Glasgow City	<a href="http://www.barrowlandballet.co.uk">www.barrowlandballet.co.uk</a>
11	Beacon Arts Centre	Multi	600,000	200,000	600,000	Inverclyde	<a href="http://www.beaconartscentre.co.uk">www.beaconartscentre.co.uk</a>
12	Birds of Paradise Theatre Company	Theatre	450,000	150,000	450,000	Glasgow City	<a href="http://www.boptheatre.co.uk">www.boptheatre.co.uk</a>
13	Bodysurf Scotland	Dance	586,277	195,426		Moray	<a href="http://www.bodysurfscotland.co.uk">www.bodysurfscotland.co.uk</a>
14	Catherine Wheels Theatre Company	Theatre	641,250	213,750	641,250	East Lothian	<a href="http://www.catherinewheels.co.uk">www.catherinewheels.co.uk</a>
15	CCA: Centre for Contemporary Arts	Multi	1,920,000	640,000	1,920,000	Glasgow City	<a href="http://www.cca-glasgow.com">www.cca-glasgow.com</a>
16	Celtic Connections Festival	Music	550,000	183,333	550,000	Glasgow City	<a href="http://www.celticconnections.com">www.celticconnections.com</a>
17	Centre for the Moving Image	Screen	3,200,000	1,066,667	3,200,000	City of Edinburgh	<a href="http://www.filmhousecinema.com">www.filmhousecinema.com</a>
18	Citizens Theatre	Theatre	3,333,000	1,111,000	3,333,000	Glasgow City	<a href="http://www.citz.co.uk">www.citz.co.uk</a>
19	Citymoves Dance Agency	Dance	300,000	100,000	300,000	Aberdeen City	<a href="http://www.danceaberdeen.com">www.danceaberdeen.com</a>
20	Collective	Visual Arts	850,000	283,333	850,000	City of Edinburgh	<a href="http://www.collectivegallery.net">www.collectivegallery.net</a>
21	Comar	Multi	1,250,000	416,667	1,250,000	Argyll and Bute	<a href="http://www.comar.co.uk">www.comar.co.uk</a>
22	Common Guild	Visual Arts	540,000	180,000	540,000	Glasgow City	<a href="http://www.thecommonguild.org.uk">www.thecommonguild.org.uk</a>
23	Conflux Scotland	Theatre	450,000	150,000	450,000	Glasgow City	<a href="http://www.conflux.co.uk">www.conflux.co.uk</a>
24	Cove Park	Multi	399,000	133,000	400,000	Argyll and Bute	<a href="http://www.covepark.org">www.covepark.org</a>
25	Craft Scotland	Craft	1,000,000	333,333	975,900	City of Edinburgh	<a href="http://www.craftscotland.org">www.craftscotland.org</a>
26	Creative Carbon Scotland	Creative Industries	450,000	150,000		City of Edinburgh	<a href="http://www.creativecarbonscotland.com">www.creativecarbonscotland.com</a>
27	Creative Dundee	Creative Industries	332,031	110,677		Dundee City	<a href="http://www.creativeundee.com">www.creativeundee.com</a>
28	Creative Edinburgh	Creative Industries	284,000	94,667		City of Edinburgh	<a href="http://www.creative-edinburgh.com">www.creative-edinburgh.com</a>
29	Cryptic	Music	850,000	283,333	750,000	Glasgow City	<a href="http://www.cryptic.org.uk">www.cryptic.org.uk</a>
30	Cumbernauld Theatre Trust	Theatre	800,000	266,667	740,000	North Lanarkshire	<a href="http://www.cumbernauldtheatre.co.uk">www.cumbernauldtheatre.co.uk</a>
31	Curious Seed	Dance	396,955	132,318	366,225	City of Edinburgh	<a href="http://www.curious-seed.co.uk">www.curious-seed.co.uk</a>
32	Dance Base	Dance	1,225,000	408,333	1,225,000	City of Edinburgh	<a href="http://www.dancebase.co.uk">www.dancebase.co.uk</a>
33	Deveron Projects	Visual Arts	330,000	110,000	330,000	Aberdeenshire	<a href="http://www.deveron-arts.com">www.deveron-arts.com</a>
34	Drake Music Scotland	Music	380,000	126,667	350,000	City of Edinburgh	<a href="http://www.drakemusicscotland.org">www.drakemusicscotland.org</a>
35	Dundee Contemporary Arts	Multi	2,000,000	666,667	2,000,000	Dundee City	<a href="http://www.dca.org.uk">www.dca.org.uk</a>
36	Dundee Repertory Theatre	Multi	5,945,010	1,981,670	5,945,010	Dundee City	<a href="http://www.dundeerep.co.uk">www.dundeerep.co.uk</a>
37	Dunedin Consort	Music	300,000	100,000	300,000	City of Edinburgh	<a href="http://www.dunedin-consort.org.uk">www.dunedin-consort.org.uk</a>
38	Eden Court Theatre and Cinema	Multi	1,500,000	500,000	2,100,000	Highland	<a href="http://www.eden-court.co.uk">www.eden-court.co.uk</a>
39	Edinburgh Art Festival	Visual Arts	300,000	100,000	300,000	City of Edinburgh	<a href="http://www.edinburghartfestival.com">www.edinburghartfestival.com</a>
40	Edinburgh International Book Festival	Literature	919,500	306,500	836,000	City of Edinburgh	<a href="http://www.edbookfest.co.uk">www.edbookfest.co.uk</a>
41	Edinburgh International Festival Society	Multi	6,952,000	2,317,333	6,952,000	City of Edinburgh	<a href="http://www.eif.co.uk">www.eif.co.uk</a>
42	Edinburgh Printmakers	Visual Arts	480,000	160,000	480,000	City of Edinburgh	<a href="http://www.edinburghprintmakers.co.uk">www.edinburghprintmakers.co.uk</a>
43	Edinburgh Sculpture Workshop	Visual Arts	700,000	233,333	700,000	City of Edinburgh	<a href="http://www.edinburghsculpture.org">www.edinburghsculpture.org</a>
44	Enterprise Music Scotland	Music	675,000	225,000	675,000	Glasgow City	<a href="http://www.enterprisemusicscotland.com">www.enterprisemusicscotland.com</a>

45	Federation of Scottish Theatre	Theatre	795,000	265,000		City of Edinburgh	www.scottishtheatre.org
46	Fèis Rois	Music	690,000	230,000	660,000	Highland	www.feisrois.org
47	Fèisean nan Gàidheal	Music	1,400,000	466,667	1,400,000	Highland	www.feisean.org
48	Fife Contemporary	Craft	315,000	105,000	300,000	Fife	www.fcac.co.uk
49	Fruitmarket Gallery	Visual Arts	2,000,000	666,667	2,000,000	City of Edinburgh	www.fruitmarket.co.uk
50	Gaelic Books Council	Literature	620,000	206,667	620,000	Glasgow City	www.gaelicbooks.org
51	Glasgow Film	Screen	1,900,000	633,333	1,900,000	Glasgow City	www.glasgowfilm.org
52	Glasgow International	Visual Arts	300,000	100,000	270,000	Glasgow City	www.glasgowinternational.org
53	Glasgow Print Studios	Visual Arts	480,000	160,000	480,000	Glasgow City	www.glasgowprintstudio.co.uk
54	Glasgow Sculpture Studios	Visual Arts	530,000	176,667	500,000	Glasgow City	www.glasgowsculpturestudios.org
55	Glasgow Women's Library	Literature	359,968	119,989	300,451	Glasgow City	www.womenslibrary.org.uk
56	Grid Iron Theatre Company	Theatre	673,200	224,400	660,000	City of Edinburgh	www.gridiron.org.uk
57	Hands Up for Trad	Music	400,000	133,333	400,000	East Dunbartonshire	www.handsupfortrad.co.uk
58	Highland Print Studio	Visual Arts	300,000	100,000	300,000	Highland	www.highlandprintstudio.co.uk
59	Horsecross Arts	Multi	1,600,000	533,333	1,000,000	Perth and Kinross	www.horsecrossarts.co.uk
60	Hospitalfield Trust	Visual Arts	300,000	100,000	300,000	Angus	www.hospitalfield.org.uk
61	Imagine	Theatre	1,095,000	365,000	1,095,000	City of Edinburgh	www.imagine.org.uk
62	Indepen-dance	Dance	346,000	115,333	300,000	Glasgow City	www.indepen-dance.org.uk
63	Luminate	Multi	300,000	100,000	300,000	City of Edinburgh	<a href="http://www.luminatescotland.org">www.luminatescotland.org</a>
64	Lung Ha Theatre Company	Theatre	440,455	146,818	440,455	City of Edinburgh	www.lungha.com
65	Lyra	Theatre	300,000	100,000		City of Edinburgh	www.lyra.co.uk
66	Macrobert Arts Centre	Multi	950,000	316,667	1,230,000	Stirling	www.macrobert.org
67	Magnetic North Theatre Productions	Theatre	300,000	100,000		City of Edinburgh	www.magneticnorth.org.uk
68	Moniack Mhor Writers' Centre	Literature	405,000	135,000	349,000	Highland	www.moniackmhor.org.uk
69	National Piping Centre	Music	450,000	150,000	450,000	Glasgow City	www.thepipingcentre.co.uk
70	National Youth Choir of Scotland	Music	600,000	200,000	600,000	Glasgow City	www.nycos.co.uk
71	National Youth Orchestras of Scotland (NYOS)	Music	650,000	216,667	650,000	Glasgow City	<a href="http://www.nyos.co.uk">www.nyos.co.uk</a>
72	NEoN (North East of North)	Digital	271,000	90,333		Dundee City	www.northeastofnorth.com
73	North East Arts Touring	Theatre	250,000	83,333	250,000	Aberdeenshire	www.neatshows.org.uk
74	North Lands Creative Glass	Craft	650,000	216,667	550,000	Highland	www.northlandsglass.com
75	Panel	Craft	270,584	90,195		Glasgow City	www.wearpanel.co.uk
76	Paragon Ensemble	Music	315,000	105,000	300,000	Glasgow City	www.paragon-music.org
77	Peacock Visual Arts	Visual Arts	770,000	256,667	800,000	Aberdeen City	www.peacockvisualarts.com
78	Pier Arts Centre	Visual Arts	800,000	266,667	800,000	Orkney Islands	www.pierartscentre.com
79	Pitlochry Festival Theatre	Theatre	1,275,000	425,000	1,275,000	Perth and Kinross	www.pitlochryfestivaltheatre.com
80	Platform (Glasgow East Arts Co)	Multi	381,000	127,000	330,000	Glasgow City	<a href="http://www.platform-online.co.uk">www.platform-online.co.uk</a>
81	Playwrights Studio, Scotland	Theatre	575,806	191,935	575,806	Glasgow City	www.playwrightsstudio.co.uk
82	Project Ability	Visual Arts	430,000	143,333	430,000	Glasgow City	www.project-ability.co.uk
83	Publishing Scotland	Literature	923,500	307,833	840,000	City of Edinburgh	www.publishingscotland.org
84	Puppet Animation Scotland	Theatre	551,000	183,667	551,000	City of Edinburgh	www.puppetanimation.org
85	Red Note Ensemble	Music	645,000	215,000	645,000	City of Edinburgh	www.rednoteensemble.com

86	Regional Screen Scotland	Screen	620,350	206,783	638,500	City of Edinburgh	www.regionalscreenscotland.org
87	Royal Lyceum Theatre Company	Theatre	3,630,000	1,210,000	3,000,000	City of Edinburgh	www.lyceum.org.uk
88	Scottish Book Trust	Literature	2,579,792	859,931	2,579,792	City of Edinburgh	www.scottishbooktrust.com
89	Scottish Contemporary Art Network (SCAN)	Visual Arts	387,000	129,000		Glasgow City	www.sca-net.org
90	Scottish Ensemble	Music	1,000,000	333,333	1,000,000	Glasgow City	www.scottishensemble.co.uk
91	Scottish Music Centre	Music	570,000	190,000	570,000	Glasgow City	www.scottishmusiccentre.com
92	Scottish Music Industry Association	Music	500,000	166,667		Glasgow City	www.smia.org.uk
93	Scottish National Jazz Orchestra	Music	650,000	216,667	650,000	City of Edinburgh	www.snjo.co.uk
94	Scottish Poetry Library	Literature	902,500	300,833	950,000	City of Edinburgh	www.scottishpoetrylibrary.co.uk
95	Scottish Sculpture Workshop	Visual Arts	585,000	195,000	585,000	Aberdeenshire	www.ssw.org.uk
96	Shetland Arts Development Agency	Multi	750,000	250,000	750,000	Shetland Islands	www.shetlandarts.org
97	Solar Bear	Theatre	600,000	200,000	600,000	Glasgow City	www.solarbear.org.uk
98	St Magnus International Festival	Music	500,000	166,667	500,000	Orkney Islands	www.stmagnusfestival.com
99	Starcatchers Production	Theatre	300,000	100,000		City of Edinburgh	www.starcatchers.org.uk
100	Stellar Quines Theatre Company	Theatre	528,000	176,000	528,000	City of Edinburgh	www.stellarquines.com
101	Stills: Centre for Photography	Visual Arts	441,000	147,000		City of Edinburgh	www.stills.org
102	Stove Network Limited	Multi	300,000	100,000	150,000	Dumfries and Galloway	www.thestove.org
103	Street Level Photoworks (Glasgow Photograp	Visual Arts	441,000	147,000	441,000	Glasgow City	www.streetlevelphotoworks.org/
104	Taigh Chearsabhagh Trust	Visual Arts	305,000	101,667	305,000	Na h-Eileanan Siar	www.taigh-chearsabhagh.org
105	The Barn	Multi	400,000	133,333	400,000	Aberdeenshire	www.thebarnarts.co.uk
106	Theatre Gu Leòr	Theatre	420,000	140,000		Glasgow City	www.theatreguleor.com
107	Timespan	Visual Arts	285,000	95,000	285,000	Highland	www.timespan.org.uk
108	Tinderbox Collective	Music	300,000	100,000		City of Edinburgh	www.tinderboxcollective.org
109	Toonspeak Young People's Theatre	Theatre	180,000	60,000		Glasgow City	www.toonspeak.co.uk
110	Touring Network (Highlands & Islands)	Theatre	360,000	120,000	360,000	Highland	www.thetouringnetwork.com
111	Traditional Arts and Culture Scotland	Multi	940,000	313,333	1,270,500	City of Edinburgh	www.trascotland.org
112	Tramway	Multi	1,050,000	350,000	1,050,000	Glasgow City	www.tramway.org
113	Travelling Gallery	Visual Arts	380,000	126,667	460,000	City of Edinburgh	www.travellinggallery.com
114	Traverse Theatre	Theatre	2,600,000	866,667	2,600,000	City of Edinburgh	www.traverse.co.uk
115	Tron Theatre	Theatre	2,540,050	846,683	2,421,000	Glasgow City	www.tron.co.uk
116	Vanishing Point Theatre Company	Theatre	850,000	283,333	817,000	Glasgow City	www.vanishing-point.org
117	Visible Fictions	Theatre	660,000	220,000	660,000	Glasgow City	www.visiblefictions.co.uk
118	Voluntary Arts Scotland	Multi	390,000	130,000	300,000	City of Edinburgh	www.vascotland.org.uk
119	Wigtown Festival Company	Literature	258,000	86,000	208,500	Dumfries and Galloway	www.wigtownbookfestival.com
120	Work Room	Dance	465,000	155,000	330,000	Glasgow City	www.theworkroom.org.uk
121	Y Dance (Scottish Youth Dance)	Dance	550,000	183,333	550,000	Glasgow City	www.ydance.org
122	Youth Theatre Arts Scotland	Theatre	400,000	133,333	400,000	City of Edinburgh	www.ytas.org.uk
123							
124							
125	<b>Total Funding to Music activities in 2018</b>				<b>£10,322,667</b>		

# Appendix Sixteen – Creative Scotland Targeted Funding

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	
1	<b>Initiatives</b>		<b>Funding</b>		<b>Area</b>													
2																		
3																		
4	Youth Music Initiative		£8,750,000															
5																		
6	Sistema		£780,000		Orchestra support													
7																		
8	Creative Business Development Support		£163,000		Enterprise support for the creative industries													
9																		
10	Cashback for Creativity		£883,000		Funding for projects and organisation offering young people (10-25 years) from deprived communities across Scotland the opportunity to engage in creative and cultural activity													
11																		
12	Audiences and Reach		£270,000		Helping to build attendance at art events													
13																		
14	Cross Border Touring		£175,000															
15																		
16	Gaelic and Traditional Arts		£205,000															
17																		
18	Time to Shine		£105,000		Access to the arts for young people													
19																		
20	Royal Edinburgh Military Tattoo (REMT) Talent Development Fund		£150,000		Young people													
21																		
22																		
23	<b>Total Funding</b>		<b>£11,481,000</b>															

## Appendix Seventeen – Additional Funding Opportunities

	A	B	C	D	E	F	G
1	Organisation		Location		Amount		Purpose
2							
3	PRS - Open fund for music creators		UK		> £5000		support development / recording / touring
4							
5	PRS - Open fund for organisations		UK		> £10,000		support development / build an audience
6							
7	PRS - Writer producer fund		UK		?		
8							
9	PRS - Women who make music		UK		> £1500		Support UK based women musicians
10							
11	PRS - Steve Reid inNOVATION Award		UK		> £1500		Support emerging artists
12							
13	PRS - Lynsey de Paul Prize		UK		£2,500		UK based female music creators
14							
15	PRS - International Showcase Fund		UK		> £5000		Help with touring abroad
16							
17	PRS - Composers Fund		UK		>£10,000		Support to help composers take control of their own career
18							
19	Creative Scotland - Open Project Funding		Scotland		£1000 > £100,000		
20							
21	Creative Scotland - Regular Funding		Scotland		£101.6 million available		
22							
23	Creative Scotland - Targetted Funding		Scotland				
24							
25	Agar Trust		Scotland		£100 - £1000		Helps musicians in rural areas of Scotland
26							
27	Awards for young musicians		UK		>£2000		Support for disadvantaged children with talent
28							
29	Collard Fellowship		UK		£5,000		To help with either Composition, Research or performance
30							
31	Craxto Memorial Trust		UK		£400 - £1000		Young musicians in need of financial help
32							
33	Accelerator Fund (MMF and Youtube)		UK		>£15000		Support for music managers
34							
35	Hit The Road (SMC)		Scotland		Mentoring		Help with touring for 14-19 year olds.
36							
37	Jazzhead Bursary		Scotland				
38							
39	Musicplus (SMC)		Scotland		Mentoring		Helps 14-19 year olds get ready for being in the music industry
40							
41	Chamber music promoter fund		Scotland		>£2500		Funds to help promote events
42							
43	Nurturing Talent Fund (Young Scot)		Scotland		£1,000		Funds to help 11 to 25 year olds and nurture talent
44							
45	Tunnel Trust		Scotland				Support for Chamber Groups to tour
46							
47	The Radcliffe Trust		Scotland		Dependant on needs		Help with training and performance for classical musicians
48							
49	Hope Scott Trust		Uk (Scotland preferred)		>£2000		Support to promote music
50							
51	Dewar Arts Award		Scotland		Average £8750		Support to musicians who are struggling financially
52							
53	British Record Industry Trust (BRIT Trust)		UK				Invests in education and wellbeing
54							
55	Hattori Foundation		UK		£6000 seniors / £1000 juniors		Support for instrumentalists to pursue a solo career
56							
57	Hinrichsen Foundation		UK				Support for the creation of new music
58							
59	Jerwood Bursary		UK		>£1250		Funds to help develop as a creative individual
60							
61	Katherine McGillivray's - Get a life fund		UK		£10000 x 2		Supports musicians to take time off and have a sabbatical
62							
63	Oppenheim - John Downes Memorial Trust		UK		£250 - £1000		Help performers who are going through periods of financial difficulty
64							
65	Peter Whittingham Jazz Award		UK		£5000 x 4		Support for jazz musicians looking to break through to the mainstream
66							
67	RNIB - Elizabeth Eagle-Bott memorial fund		UK		>£10000		Support for blind musicians - particularly classical (organists preferred)
68							
69	Stephen Oliver Award		UK		>£5000		Assistance to help a composer bring their work to the stage (theatre)
70							
71	The Fenton Arts Trust		UK		>£5000		Financial and knowledge available to applicants involved in the arts
72							
73	The Michael Tippett Musical Foundation		UK		£500 - £4000		Financial assistance to help with group music making (young people)
74							
75	The Zetland Foundation		UK		Mentoring and Financial Support		Assistance for young musicians
76							
77	The Tillett Trust		UK		£		Support for young, classical musicians
78							
79	Live Music Now		UK		Support and opportunities		Support for live performances - chance of paid work

# Appendix Eighteen - Managers

	A	B	C	D	E	F	G	H	I
1	Business Name		Managers		Location		Acts		Income
2									
3	Kingdom Management		Scott Kirkwood		Glasgow		Ninth Wave, Lucia and the Best Boys, Walt Disco		
4			Hamish Fingland						
5			Bjorn Sandberg						
6			Rosie Watson						
7			Aimmi Dunsmuir						
8									
9	First Run Records		Kyleigh		Glasgow		Gerry Cinnamon		
10									
11	677MM		Denise Allan		Glasgow		Glasvegas, Freakwave		
12									
13	Morsecode Management		Brendan Moon		Glasgow		Louis Berry (ex Paolo Nutini) , GUN		
14									
15	Craft Management		Ray Black		Edinburgh		Mogwai, Twilight Sad, Kathryn Joseph		
16									
17	A Modern Way		Michael Lambet		Edinburgh		Fatherson, Idlewild		
18			Bruce Craigie						
19									
20	Francis McDonald		Francis McDonald		Glasgow		Camera Obscura		
21									
22	1554 Management		Dee Bahl		Glasgow		Biffy Clyro		
23									
24	No Half Measures		Dougie Souness		Glasgow		Wet wet wet, Anchor Lane		
25									
26	G R Management		Rab Andrew		Glasgow		Primal Scream, Texas		
27									
28	Manana Music Management		Lyle Scougall		Glasgow		Joesef		
29									
30	Twoup		Ally McCrae		Glasgow		Prides		
31									
32	Matt Sadowski		Matt Sadowski		Glasgow		Holyesque		
33									
34	Breath under Water		Louis Lewis		Glasgow		Be Charlotte		
35									
36	Active Events		Lisa Whytock		Glasgow		Elephant Sessions		
37									
38	Adrian Hunter								
39									
40	Kenny Macdonald						The Proclaimers		
41									
42	Mark Whyles Management				Edinburgh		Karine Polwart Treacherous Orchestra		
43									
44	Jamie Webster	Works for a london agency			Glasgow		Man of Moon		
45									
46	Aimmi Dunsmuir				Glasgow		Twin Atlantic		
47									
48	Jamie Gilmour						WWPJ		
49									
50	Artii				Glasgow		LaFontanes		
51									
52	Barry Stewart Management						Red hot chilli pipers - Skippinish - Eddi Reader		
53									
54	7west music				Glasgow		Spyres - The Dunts		
55									
56	Jumping the shark management				Glasgow		AFP - Declan Welch - Cara Rose - Memes		
57									
58	Gordon Webber						Blazing Fiddles		
59									
60	The Bothy Society				Glasgow				
61									
62	23 music management								
63									
64								Total	£1,134,350
65									



# Appendix Nineteen – Booking Agents

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	<b>Business</b>		<b>Location</b>		<b>Genre</b>								
2													
3	Active Events		Ayr		Folk and Roots		Lisa Whytock				10% of live earnings		
4													
5	CCM Live		Glasgow		Folk (Worldwide)		Craig Corse				10% of live earnings		
6													
7	ATC Live		Glasgow		Pop and Rock		Colin Keenan				Survey response... can't be anyone else		
8													
9	Offsite Productions		Dumfries				Katch Holmes						
10													
11													
12													

# Appendix Twenty – Publishing Companies

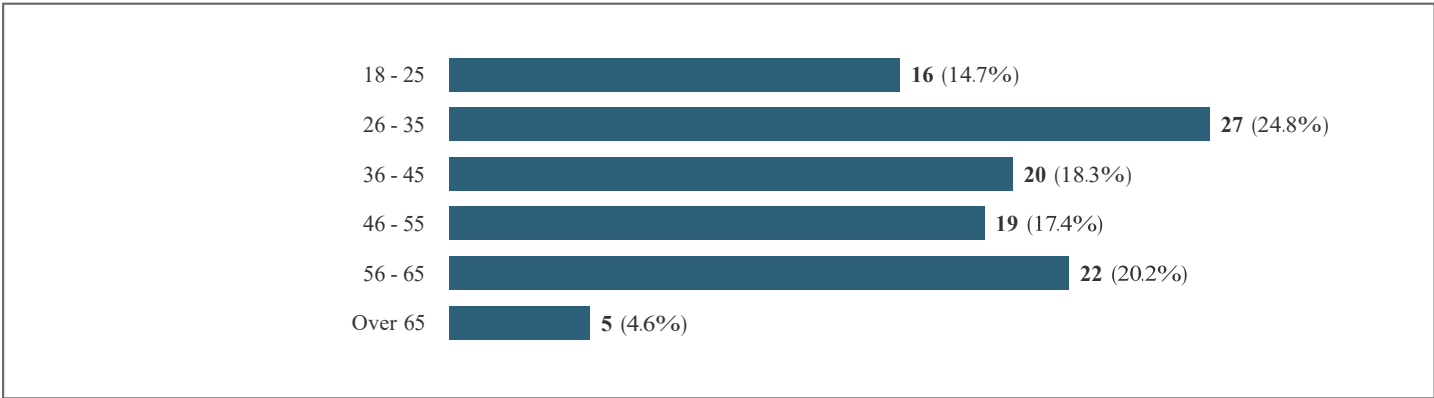
	A	B	C	D	E	F	G	H	I	J	K
1			<b>Location</b>		<b>Genre</b>		<b>Income</b>				<b>Details</b>
2											
3	ISA music publishing (Lismor)		Glasgow		Eclectic						Part of the Lismor Group
4											
5	Taigh na Teud		Skye		Traditional						Sheet music publisher
6											
7	23rd precinct		Glasgow		Rock / Pop						Survey Details
8											
9	Kroma Editions		Glasgow		Chamber Music						Sheet music Publisher
10											
11	Caritas Music Publishing		Ullapool		Celtic						Sheet Music
12											
13	XA music Limited		Jura								
14											
15	Bardic Edition		Aberdeen		Composers						Sheet Music
16											
17	Jammy Music Publishing		Greenock								Jamie (EmuBands)
18											
19											

# Appendix Twenty-One – Survey

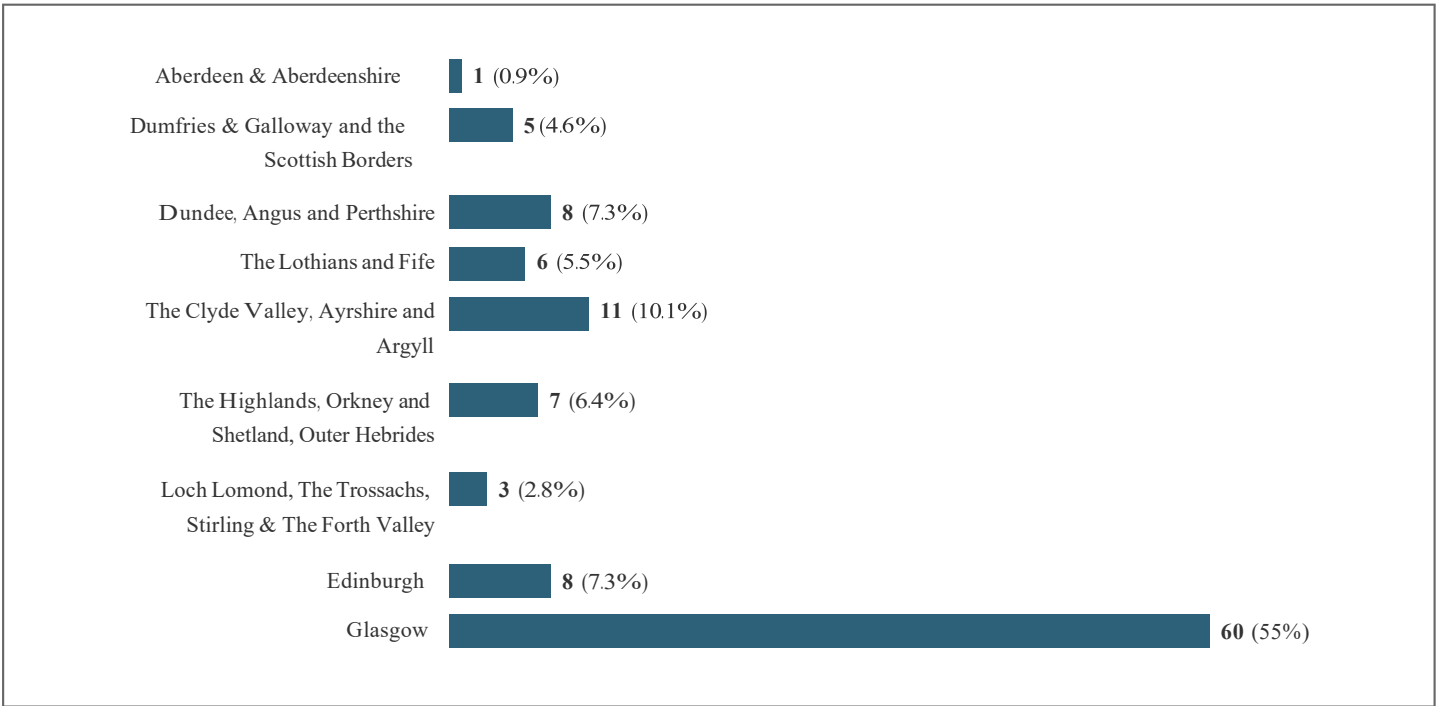
**1** Do you agree to participate in the following survey and give permission for your data to be used as outlined in the participant consent form?



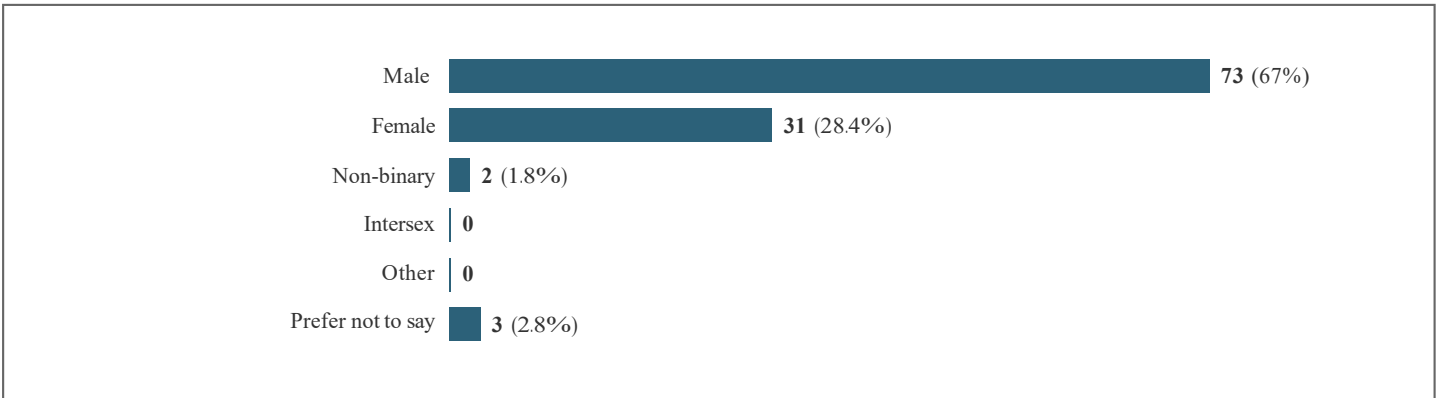
**2** What is your age?



**3** Where are you geographically located?



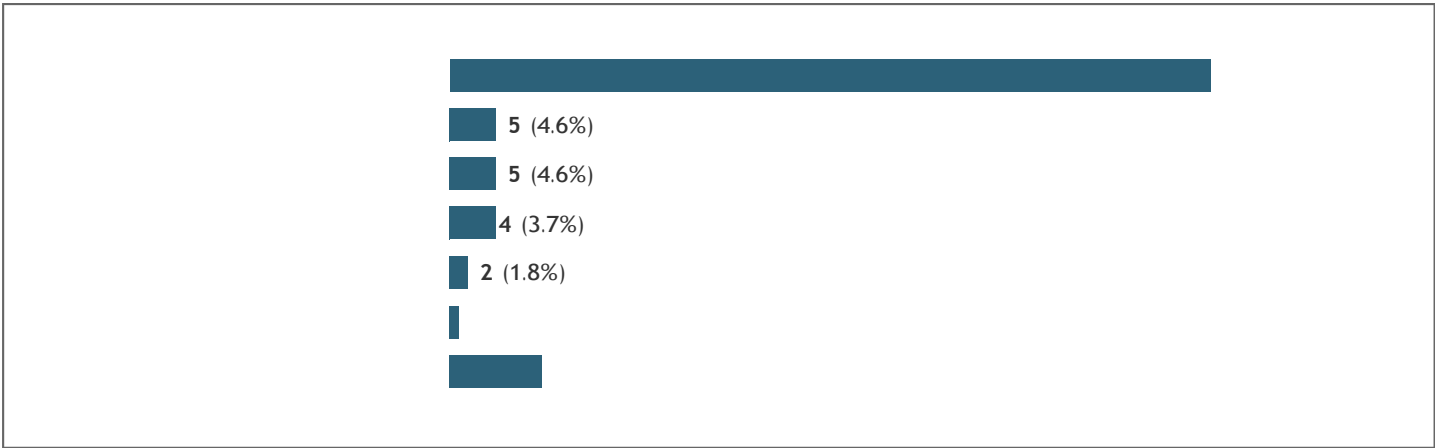
**4** What is your gender identity?



**4.a** If you selected Other, please specify if you wish:

*No responses*

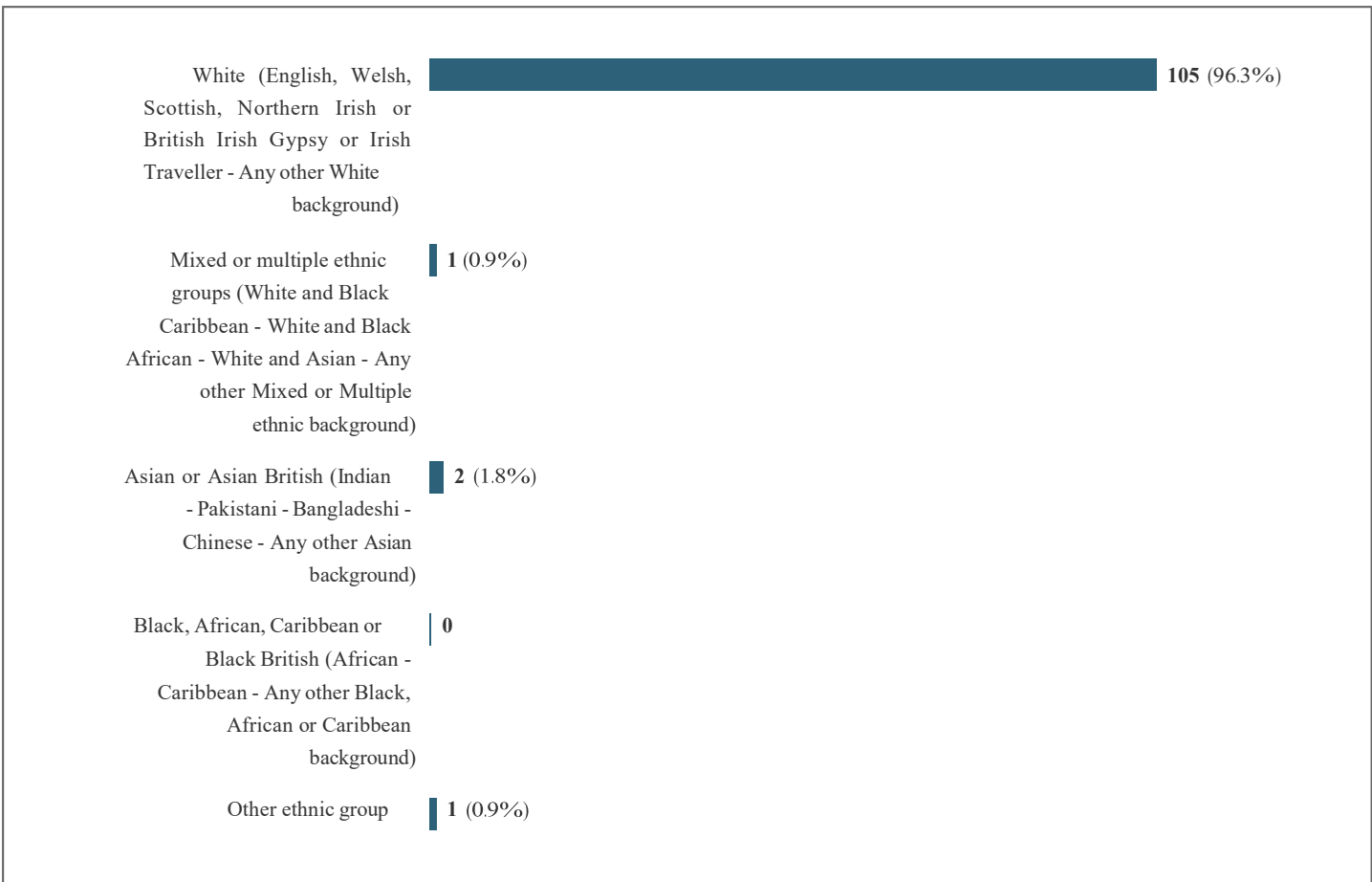
**5** What is your sexual orientation?



5.a If you selected Other, please specify:

Showing 1 response	
Asexual	741178-741169-81347817

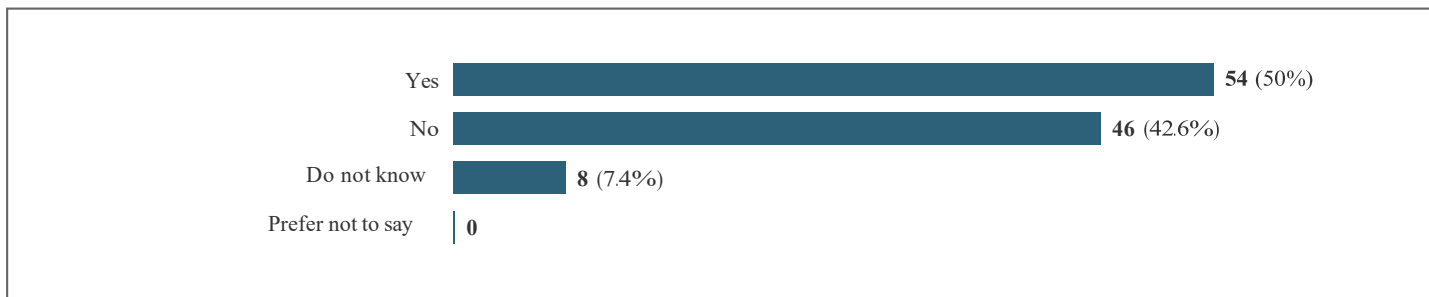
6 What is your ethnicity?



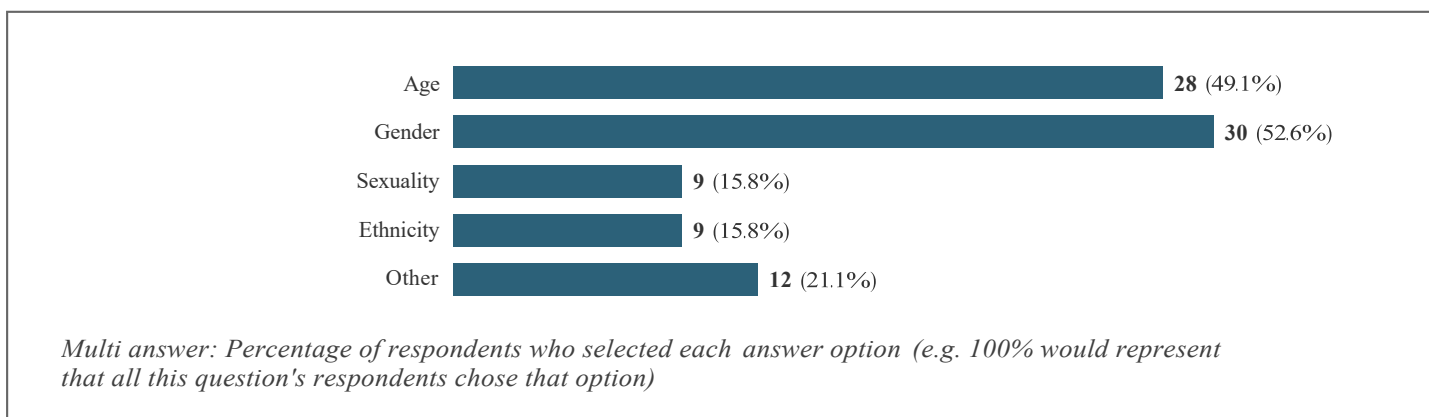
6.a If you selected Other ethnic group, please specify:

Showing 1 response	
Celtic / Gael 'White' or 'Black' etc. are not ethnicities.	741178-741169-81547124

7 Have you ever experienced discrimination in the music industries?



7.a If yes, what was the context?



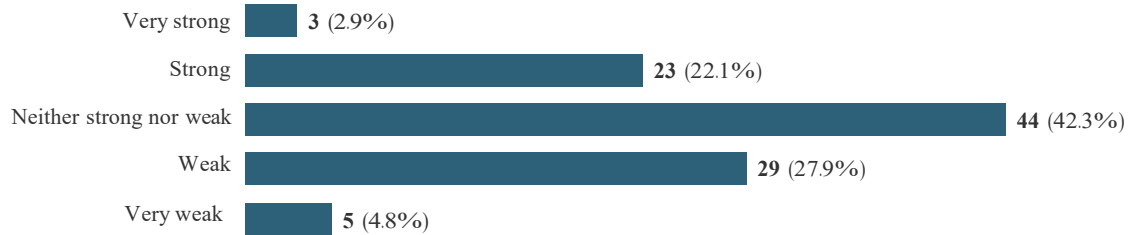
7.a.i If you selected Other, please specify:

Showing first 5 of 12 responses	
MUSIC TASTE	741178-741169-81333783
Religion	741178-741169-81335070
class	741178-741169-81360691
Chronic illness	741178-741169-81360873
Size	741178-741169-81369652

8 How would you rate each aspect of the music sector in Scotland based on functionality? (please

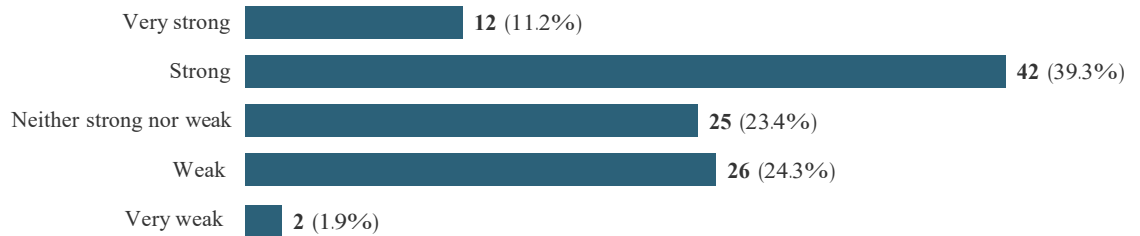
select all that apply)

### 8.1 Music distribution



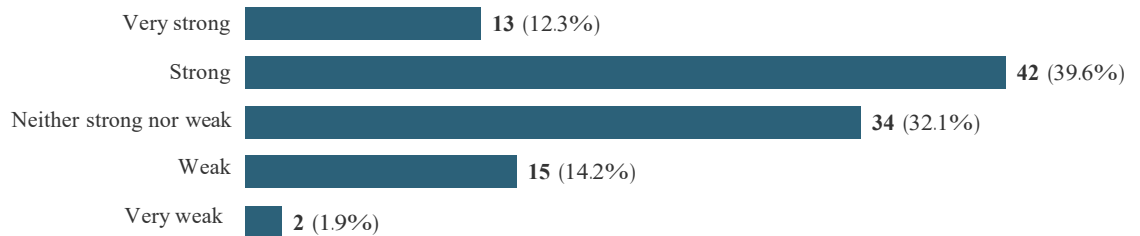
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

### 8.2 Music education



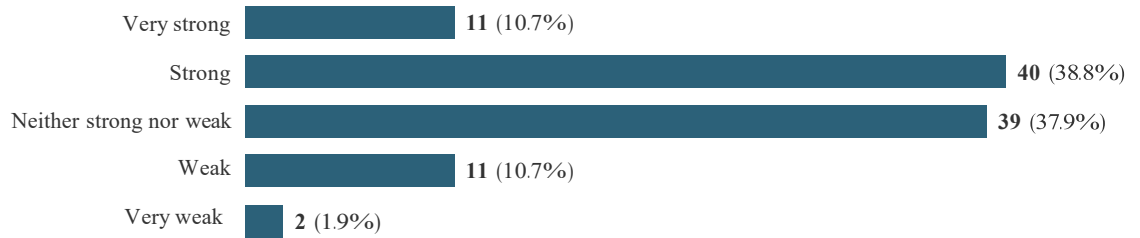
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

### 8.3 Community music



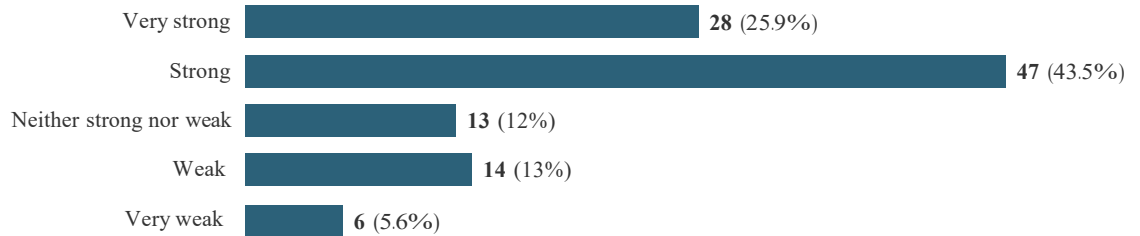
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

### 8.4 Amateur / voluntary sector



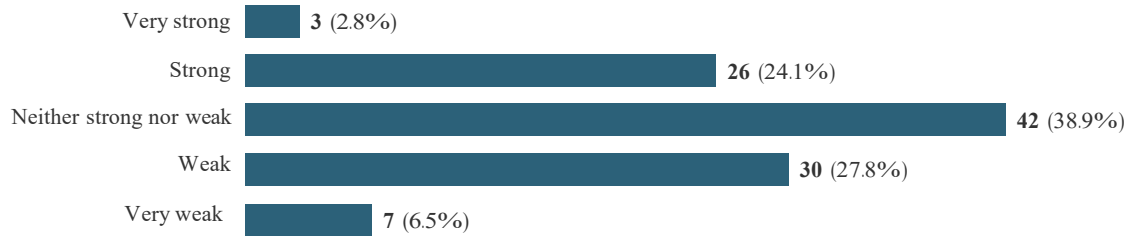
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

## 8.5 Music venues



*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

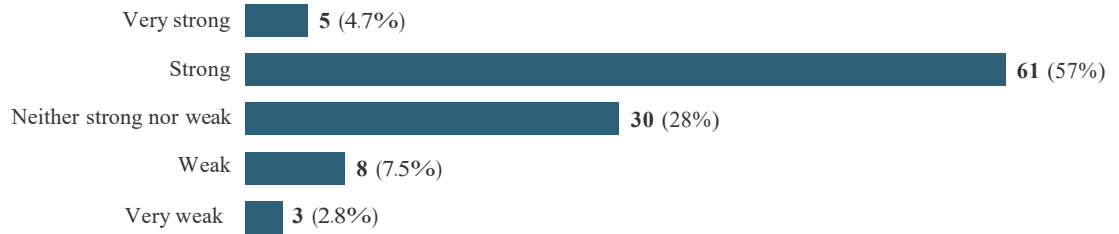
## 8.6 Music retail



*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

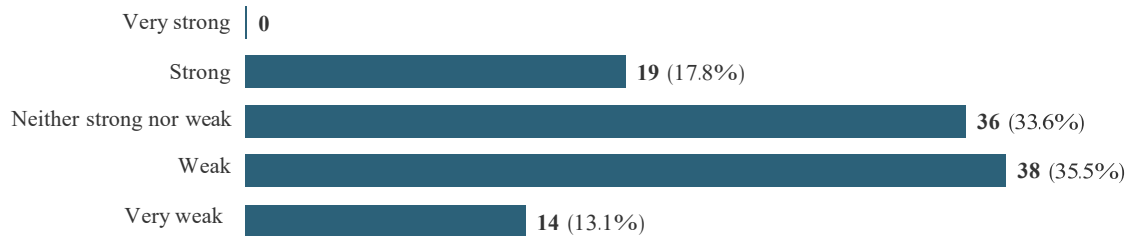
## 8.7 Recording Studios





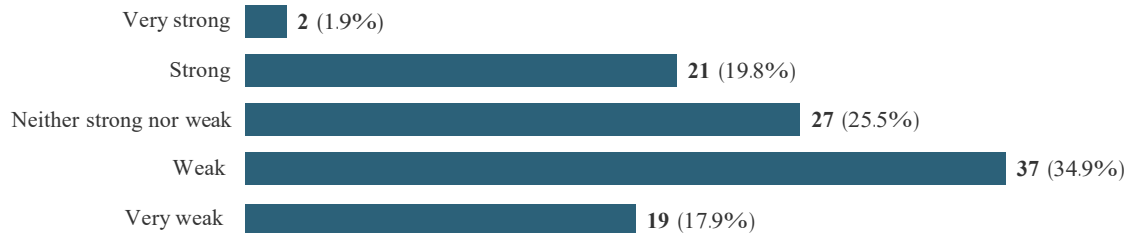
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

### 8.8 Media support - Press / radio / TV



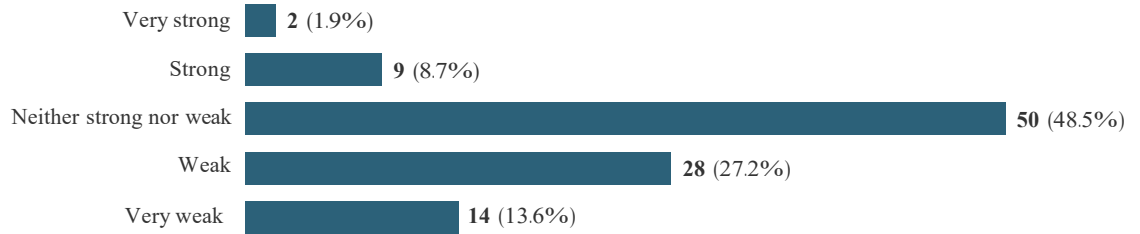
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

### 8.9 Government (funding)



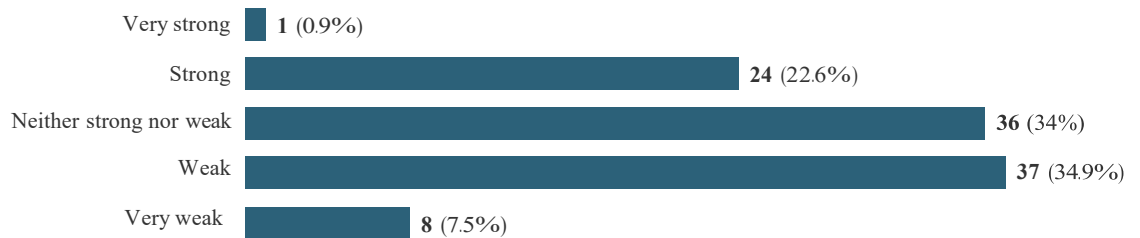
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

### 8.10 Music Managers



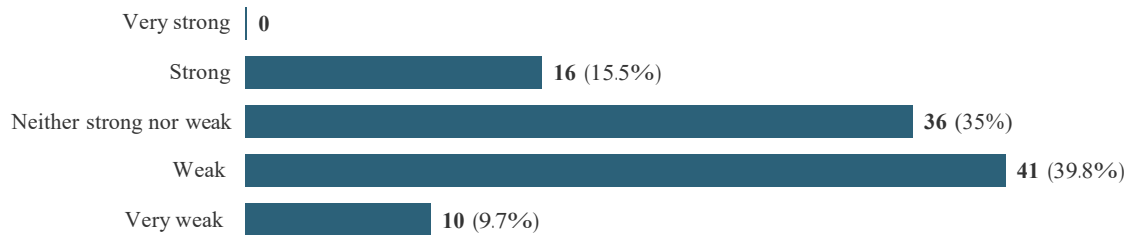
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

### 8.11 Touring Infrastructure



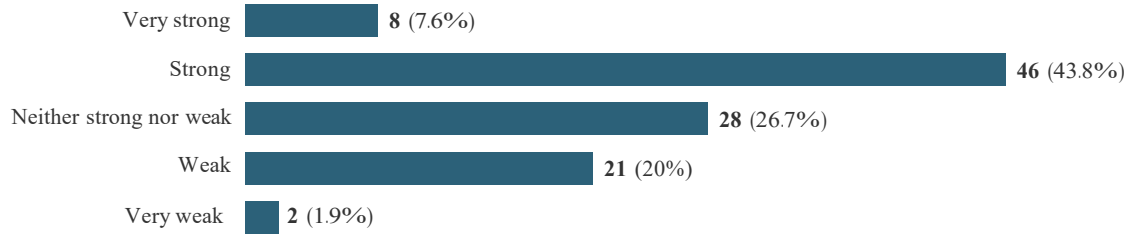
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

### 8.12 Live agents



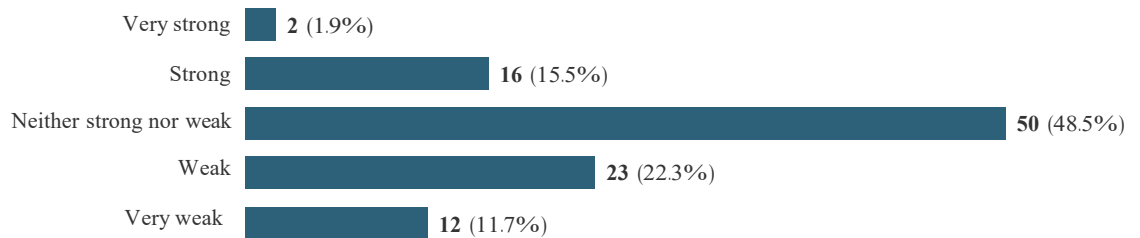
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

### 8.13 Festivals



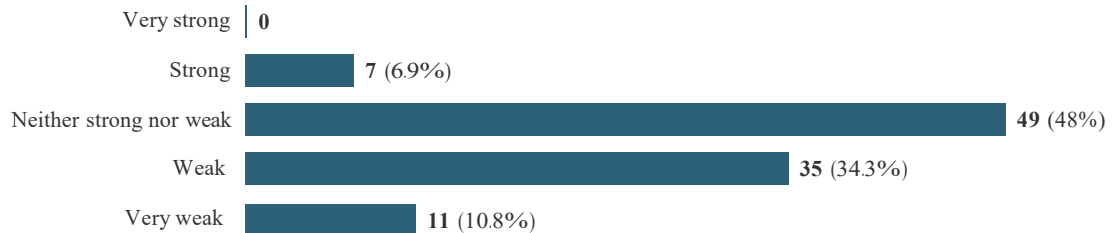
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

#### 8.14 Trade bodies



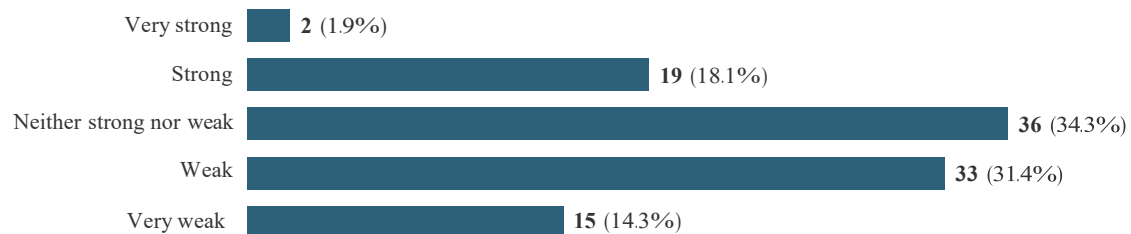
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

#### 8.15 Publishing



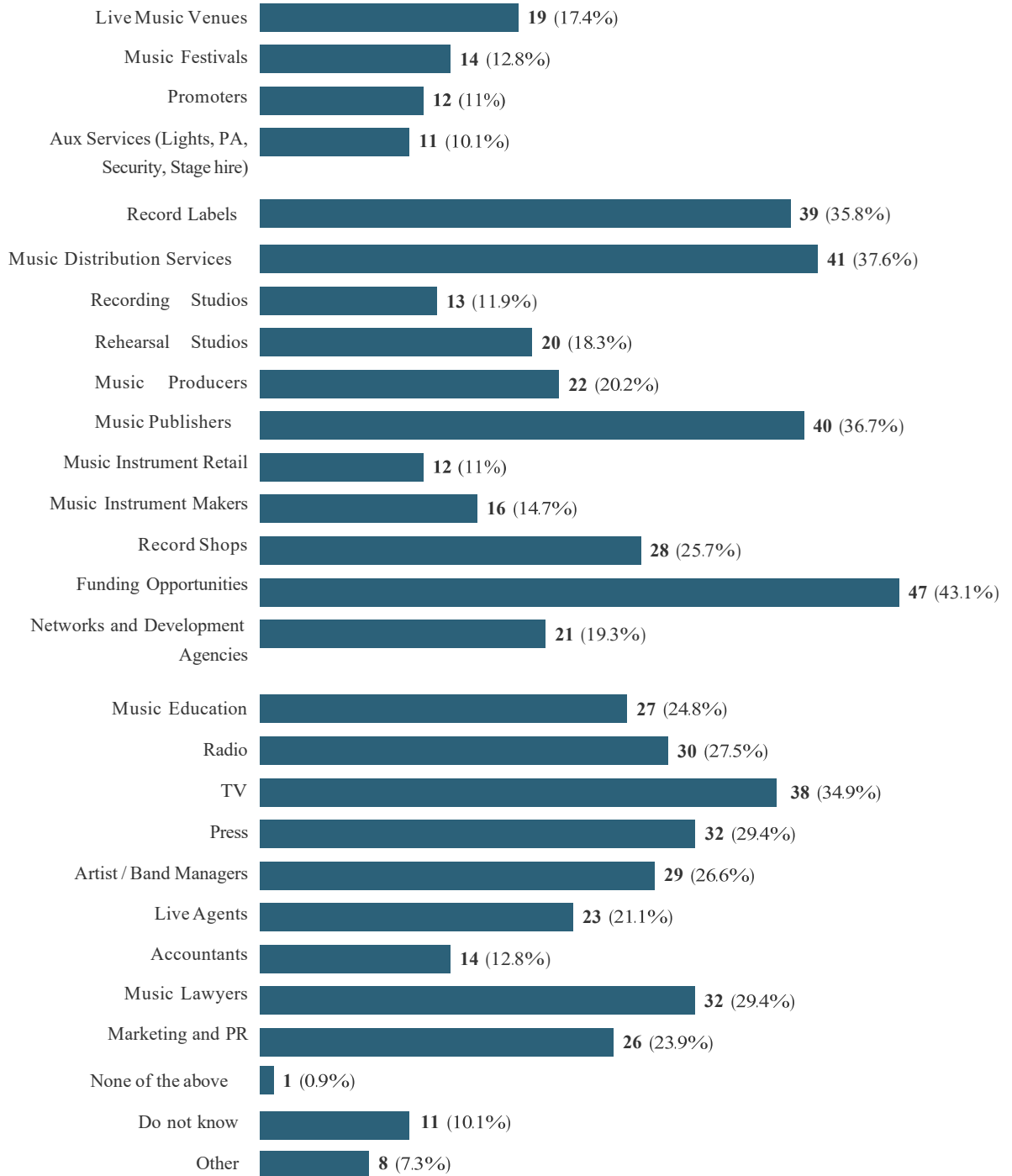
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

#### 8.16 Record Labels



*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

9 Are there any stakeholders within the Scottish music industries which you feel are underrepresented leaving a gap in provision? (please select all that apply)

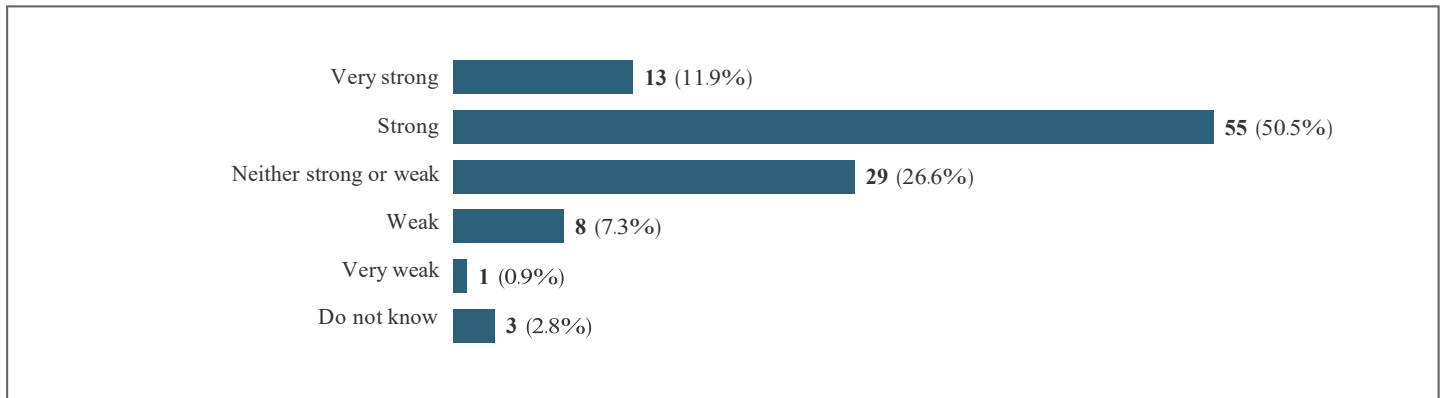


*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

9.a If you selected Other, please specify:

Showing first 5 of 8 responses	
MUSIC BUSINESS MANAGERS	741178-741169-81333783
Live music install companies	741178-741169-81333851
The supply chain	741178-741169-81334679
female producers, lawyers etc!	741178-741169-81336762
Pre-Production facilities	741178-741169-81350690

**10** Before the Covid-19 pandemic, how strong was the music sector in Scotland?



**10.a** Please specify why you feel this way.

Showing all 80 responses	
It's not a feeling, it's a fact. The Scottish music industry is massively under represented at nearly every level.	741178-741169-81333834
LIVE VENURE AND MUSIC PROMOTION IN GLASGOW AND EDINBURGH ESPECIALLY STRONG. LOTS OF RADIO STATIONS AND ACCESS TO PODCAST CONTENT GENERATED IN SCOTLAND TO PROMTE NEW RELEASES	741178-741169-81333783
I have been based in London until January 2021 when I moved back to Glasgow to continue working for a London based distribution company so I am not fully familiar with the industries strengths and weaknesses prior to covid.	741178-741169-81333926
Only speaking for my own sector, Folk Music. and specifically Folk Music not generated by the Conservatoire	741178-741169-81334053
Because scot gov and WM have trashed the industry with no care and no thought or understanding of how it works. Disgusted doesn't even begin to describe my ire at all politicians through this.	741178-741169-81334679
For a country of its size the output of events, successful releases are impressive. IMO it lacks clearer collaborations with wider UK industry.	741178-741169-81334423
Music from Scotland always punches above it's weight in the 'UK' music	741178-741169-81335070

sector. Despite Scotland being treated by the London based major labels as little more than another city of the 'UK'.	
I feel I cannot answer any of the questions that are outwith my actual participation. In what way is a strong sector identified? Financially? I don't know if a recording studio is 'weak' or 'strong'	<a href="#">741178-741169-81335199</a>
While Scotland showcases a lot of talent and successfully exports music internationally, the culture of attitudes and prejudices regularly practiced within the infrastructures of our current music industry fails to cultivate new talent in an efficient way and fails to protect underrepresented demographics from abuse and bullying. There is a lack of any real regulation in the scene, no system for complaints, no compliance offer to regulate policy compliance and working conditions for government funded projects, no compliance from our unions to ensure the prevention of bullying, and no HR, all of which facilitates the music scene's cycle of victimising women who complain of their own mistreatment, and perpetuates the systemic harassment of underrepresented demographics in what is a highly competitive work place. A lack of financial regulation means no transparency, therefore the impossibility for equal pay. While our unions work hard to encourage companies to adopt safeguarding policies for freelancers, they have no legal obligation to do so, and poor working conditions, poor conduct, and risk of sexual assault, create a male-dominated scene whereby some(many) women will not achieve their full commercial potential, therefore I would describe this infrastructure as very weak.	<a href="#">741178-741169-81335192</a>
Scotland though such a small part of UK touring has always had a great reputation and has always been the most fun shows to play and having the opportunity to play to such a great crowd. I think the industry was strong but this is thanks to the people not funding or government bodies.	<a href="#">741178-741169-81336023</a>
Scotland has always had a thriving music scene.	<a href="#">741178-741169-81336183</a>
For the first time in a number of years, Scotland is represented on a global scale, particularly through the increase in major label artists in Scotland. I personally believe there is a higher sense of community within current managers who are willing to help each other out, in breaking barriers between Scotland and London, with introductions and sharing knowledge.	<a href="#">741178-741169-81336416</a>
Like anything in life, if you are involved with something you feel passionate about, you will network and build a supportive network around you. As soon as you leave the sector it is as if it doesn't exist. It only exists for those who are part of that process of making, recording, releasing etc and not for the general public. So before the pandemic I was very involved. During the pandemic (i.e. now) I am not due to the cover restrictions in place.	<a href="#">741178-741169-81336762</a>
Based purely on the amount of both new and established high quality artists and bands playing live shows, Scotland pre-covid had an embarrassment of riches. The catch is in my experience, most of their careers were funded from other income revenues out-with music. So, strong on the talent front but the sector did not provide a financially rewarding environment for most people's careers to thrive.	<a href="#">741178-741169-81338325</a>
I've lived in the UK for almost 20 years and the most avid music fans and industry professions have all said that Glasgow is a close second to London in regards to variety and support of music.	<a href="#">741178-741169-81340048</a>

Music in Scotland across all genres had a strong identity especially locally.	741178-741169-81342364
There was a robust, if underplayed, touring circuit and a good sense of community. Enough successful indie labels fir a country this size. Highland touring, or rural touring of any kind, was under resourced and inaccessible though.	741178-741169-81342555
Very strong live scene across mulitple genres. Talent-wise, we always have and continue to punch well above our weight.	741178-741169-81343900
There's a serious lack of joined up thinking, lack of decent middle sized venues, lack of management and record labels. I have also absolutely no faith in BBC adio Scotland Introducing ever airplaying my music even although the product and production are exemplery. Serious lack of radio stations and areas wherein you can advertise your music. Creative Scotland applictions for funing procedures are far too complex and the whole Scottish music scene suffers from nepotism and favoritism.	741178-741169-81346762
The number of professional musicians and highly collaborative music community.	741178-741169-81347817
Vibrant and successful sector	741178-741169-81348294
Parts of the music industry are strong but it seems like before COVID it was very disjointed. There doesn't seem to be effective creative collaboration and sign posting to services, particularly at the beginning of a career in the industry. The landscape is confusing. A lot of our industry is Scotland is also outsourced to other countries in the U.K. and wider Europe.	741178-741169-81348365
scotland has long had one of the world's most vibrant music sectors	741178-741169-81349109
Live music scene is strong. Developing and promoting new artists is very weak.	741178-741169-81349292
Lots of concerts and festivals, a vibrant new band scene	741178-741169-81350690
Lots of live music in many different venues.	741178-741169-81353230
Scotland has a great music scene but elevating beyond that seems difficult for most musicians to come out of Scotland.	741178-741169-81354175
Music sector is very glasgow-centric in Scotland. Much of the massive amount of music available is glasgow, 7 nights a week, pre-pandemic is on the backs of local artists either playing for free, a pint, or very small Payment	741178-741169-81360653
The infrastructure was all in place, though patchy depending on where you were	741178-741169-81360691
	741178-741169-81360873
It seemed vibrant and active as a sector. It is difficult to comment on the sector as a whole when I only operate in what feels like a small part of it, but my perspective is that it seemed strong.	741178-741169-81360906
There are several amateur choirs, orchestras and musical theatre groups (no local opera) with lackluster rehearsal and performance space and very little infrastructure to promote concerts. Funding seems to be nearly impossible to get to start a new venture. I was interviewed as musical director for a full scale production at Eden Court in Inverness and was told	741178-741169-81369652



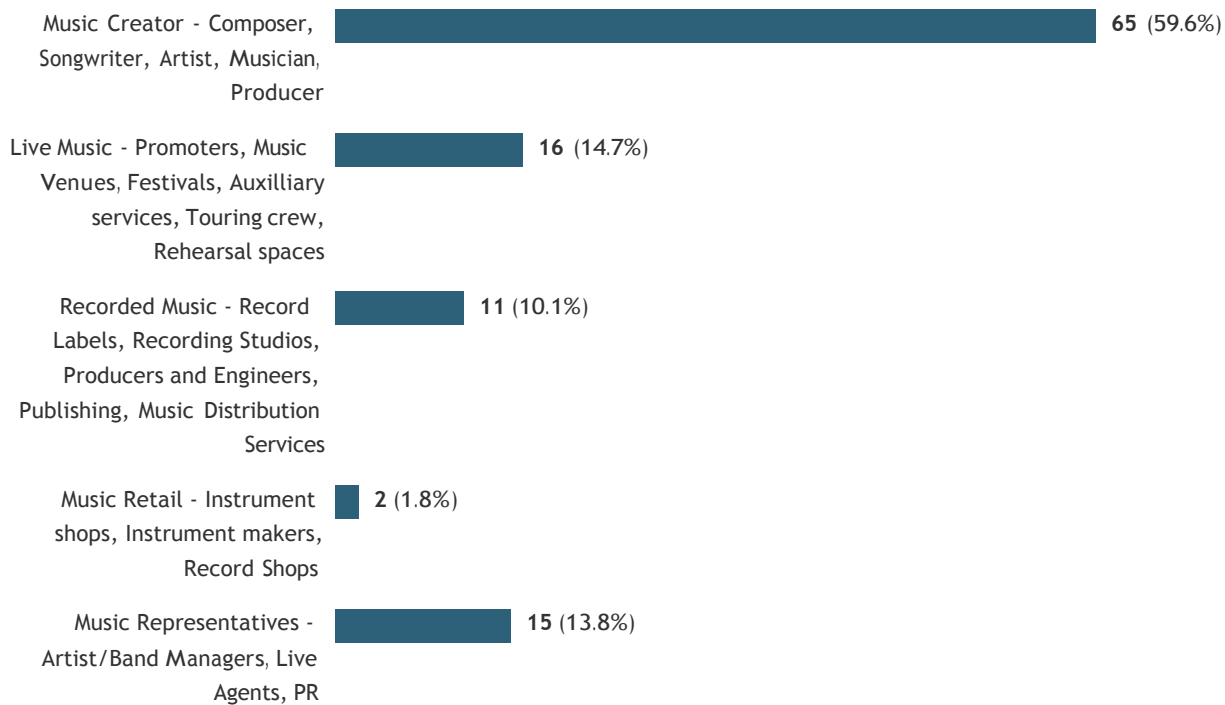
it was a volunteer position. Absurd.	
We had a great live scene, a flourishing number of established and up and coming bands/record labels.	741178-741169-81375835
<p>Music is a humongous cultural contributor in Scotland. It is a country saturated with world class musicians. So much so, in any given night in Glasgow (where I live), you are almost guaranteed to stumble across free to access sessions, jams etc as well as fully promoted gigs and so on. People here love music and the musicians love the community around it in Scotland.</p> <p>Through the accessible nature of the communities here in Scotland, there is increasing cross over between genres; fusions and new bonds forging to create a more collective front.</p> <p>Government fail to supply adequate funds to the arts and as such, school music education is dismal. I was fortunate enough to attend a music school on scholarship and receive a full musical education and am was part of a minority of musically inclined people who got to access this sort of education. Government syllabus stifles creativity, and the societal view still very much seems to lean towards music as a hobby and not a 'viable' practice. This outlook resonates through schooling syllabus and government support for the arts/music sector.</p> <p>Irregardless, the sector pre-pandemic was thriving; musicians creating, performing, collaborating, and making a mark. It was and will be again a hub for music and arts.</p> <p>I feel that people are slowly redistributing industry work; moving away from London; creating opportunities elsewhere. This is something Scotland could definitely benefit from. More access to upper-level industry specialists such as managers and labels (in my opinion) would be advantageous. The same goes for PR companies. As a musician, I often outsource to PR down south as there is a not a huge amount of option in Scotland currently.</p>	741178-741169-81374831
Because I'd never been busier in my role as a promoter rep	741178-741169-81392880
If relating it specifically to folk song there were very few large folk club venues running in 2020 in comparison with the mid-1970s when there were literally hundreds. There were also many non-folk clubs venues in the 1970s/80s. ie Social Clubs, Local Gala Weeks etc. The folk sector in Scotland had become very selective and the larger venues/festivals used a limited selection of guests, guests related to agents, the Gaelic language and graduates from The Conservatoire. Grass roots folk song had declined dramatically.	741178-741169-81398409
It was faring well.	741178-741169-81400124
Good variety of music, becoming more diverse, good networks, pretty open and positive	741178-741169-81400566
Lots of emerging Scottish Artists and loads of good quality festivals	741178-741169-81409912
An incredible amount of talent in all sectors and areas of the industry which always supports Scottish work.	741178-741169-81422245

<p>Fairly strong, but pay is/has always been problematic and lack of proper infrastructure across the board, from live music venues to promoters, etc - unless it's a super high profile act. Serious lack of professional development agencies with ad hoc specialism for specific styles (e.g. jazz/blues) - lack of export office. Lack of cohesion in the industry, lack of thorough understanding of the sector from many funding bodies. Lack of activity to attract non Scottish buyers to talent scout in Scotland.</p>	<p>741178-741169-81436761</p>
<p>Varies within the overall music sector.</p>	<p>741178-741169-81444357</p>
<p>Scotland's Music sector has never felt particularly strong since the early 90's due to major labels and publishers being mainly based in London</p>	<p>741178-741169-81462982</p>
<p>It's still an ever growing industry in Scotland, we lack behind comparing to London where they have near enough everything at anyone's doorstep, it's harder to get involved in Scotland I think.</p>	<p>741178-741169-81475736</p>
<p>I think live music in trad music was relatively healthy</p>	<p>741178-741169-81475566</p>
<p>A range of high quality professional acts able to tour and sustain life as professional artists. A solid infrastructure around rehearsals, recording and live events. Marketing and online distribution has always felt low on a priorities list.</p>	<p>741178-741169-81477946</p>
<p>I moved back to Scotland after living in the South East of England for 10 years, I feel that Scotland has a great music scene in various parts of the country but it's not represented well, the bulk of the coverage is focussed in England, so is the international attention. London in particular - there is often something like, for example, the South London Jazz scene that gets coverage in the press that suggests it's a bigger scene than it acutally is. There are equivalentns in Glasgow and Edinburgh that don't ever get a look in.</p> <p>There perhaps isn't enough of a network to really platform music from Scotland in the way that I feel it could be post-Brexit/pre-Independence. Part of that could be the rural nature of certain parts (I grew up in the Borders), but even here in Edinburgh I feel like it's a little bit insular, there's not enough people looking in or out.</p> <p>Also, often we're lucky if a successful mid-tier act tours any further north than Leeds or Manchester. Sometimes people visit Glasgow and that's it., which seems a shame for the rest of the country.</p>	<p>741178-741169-81483771</p>
<p>Everything was represented from amateur to professional in trad, pop and classical, maybe less so in jazz</p>	<p>741178-741169-81473686</p>
<p>Were parts of industry that were, and remain, very good from a cultural aspect. But overall picture for me, I'd seen so many venues closing down around me whilst being involved in industries before pandemic and that's only accelerated with Covid-19. I feel there needs to be more government/local council support for the industries to inject cash flow into the music economy - can't see where else initial money will come from - but also more support in funding new projects and re-focussing on music education which has been cut shockingly and dramatically over the last decade. As someone with a music industries degreee, without music education I'd not be who I am today - so this is a must to keep educating young people.</p>	<p>741178-741169-81494404</p>

Great venues and promoters	741178-741169-81519809
There was much high quality live and recorded music in Scotland from all genres. Good support from Scottish press and media, particularly Radio Scotland.	741178-741169-81520027
There has been a decline in many aspects of the music industry during past 10- 15 years including:  Live gig opportunities for artist Decline in independent and other record shops Support for instrumental tuition Diversity of Govt. funded support	741178-741169-81542518
small, haphazard and lacking in real opportunities	741178-741169-81545120
I've been living and working anywhere except for the past 25 years.	741178-741169-81545273
Compared to European nations of similar size and demographics, we lag behind in these aspects. Obviously conducting this survey during the pandemic is going to skew some results. The fact that very few musicians earn a living wage in Scotland tells a story.	741178-741169-81547124
The sector has been on a downward spiral for a number of years. We have some great venues, but no variety. Indie Rock/punk seems to be the only genres that get the regular gigs. Average musicians and awful ticket deals with sales mostly going to families doesn't help the sector at all. I'm yet to see a good band with proper musicians gain a true fan base.	741178-741169-81553758
The strength of the live industry in Scotland, coupled with small pockets of local scenes producing artists who were able to break through into international stages were the strengths of the music sector. Very much punched above its weight, despite obvious flaws.	741178-741169-81568660
Fantastic history of breaking major artists, interesting vibrant current music scene	741178-741169-81591788
In a local/community sense, it was fairly strong, however we should see our industry in a national sense, and with little funding or national TV/press media support, the music sector remains small and local.	741178-741169-81607769
It was there one could say strong but life for musicians was shit - under paid - not given respect -	741178-741169-81619642
Strong is a way but its' strength has been unmasked as heavily unbalanced with the pandemic. Every single sector was so reliant on the live industry including things like publishing. Songwriters/artists losing valuable PRS income not performing live or having weekly residencies. Generally speaking I still think the Scottish music industry is strong.	741178-741169-81631556
Represented by the number of live gigs being staged every night.	741178-741169-81640327
Plenty opportunity for musicians	741178-741169-81648389
I work in the traditional music scene, which is thriving in Scotland. Need more agents to help generate the work for more acts.	741178-741169-81698135
Thriving within and outwith Scotland	741178-741169-81765350
Many reasons.	741178-741169-81793007

<p>The amount of high quality festivals each year.  The amount of high quality venues.  The high standard of submissions to the SAY AWARD.  The high standard of musicians The RCS and other music courses from Colleges &amp; Uni's are producing.</p>	
<p>Very established across the board in terms of levels within each category whether infrastructure or talent musical or technical</p>	741178-741169-82063112
<p>Plenty of gig opportunities. A scene was developing and abruptly stopped when covid hit. It was very hard for anyone to keep up the momentum in the same way as pre pandemic.</p>	741178-741169-82063839
<p>There was a wonderful diverse array of festivals and tours. A lot of music bars have closed whether they will re-open.</p>	741178-741169-82068515
<p>Gigs were available and music teachers were available</p>	741178-741169-82122427
<p>This is a very poorly-worded question. The "music sector" was fairly strong locally where I live, pre-covid, but I - and I would imagine most other musicians - cannot offer an opinion for the whole of "Scotland".</p>	741178-741169-82472685
<p>I was attending gigs every weekend where they were quite busy, not as busy as they could have been though. Attend lots of festivals which I think Scotland is good at. Could be more mainstream advertising for musicians.</p>	741178-741169-82518201
<p>It felt fairly lively with plenty of work for musicians.</p>	741178-741169-82634681
<p>Many festivals, opportunities for freelancers, multi-genre opportunities</p>	741178-741169-82646146
<p>Answer based mainly on Glasgow, as before the pandemic the sector in Edinburgh was being decimated, and I have little knowledge of other cities in Scotland. In Glasgow, there were many venues and plenty of events in those venues. Also plenty of labels and managers.</p>	741178-741169-82735864
<p>A lot of music was released and the love sector was strong.</p>	741178-741169-82737868
<p>Strong artistically but poor overall infrastructure</p>	741178-741169-82742837
<p>Some great music, venues, backstage people and shows but ultimately lack of consistency (cross organisational and union collectives) and lack of ways to measure strength in the industry (where is the money generated and who gets paid?)</p>	741178-741169-82752916
<p>The Scottish music industry was one that punched above its weight pre-pandemic, recognised and celebrated all over the world.</p>	741178-741169-82749518
<p>On the face of it the industry up here does well however it can be argued that it is still dependant on the UK economy/music industry as a whole. Which as it stands is being ground into the dirt by Brexit.</p>	741178-741169-82949546

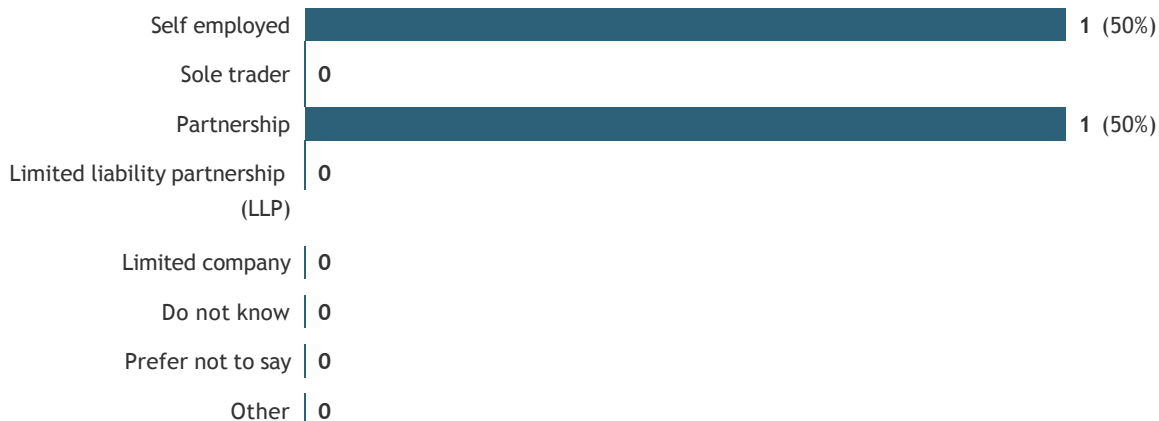
**11** What is your primary sector of work within the Scottish music industries?



**12** Please select your profession



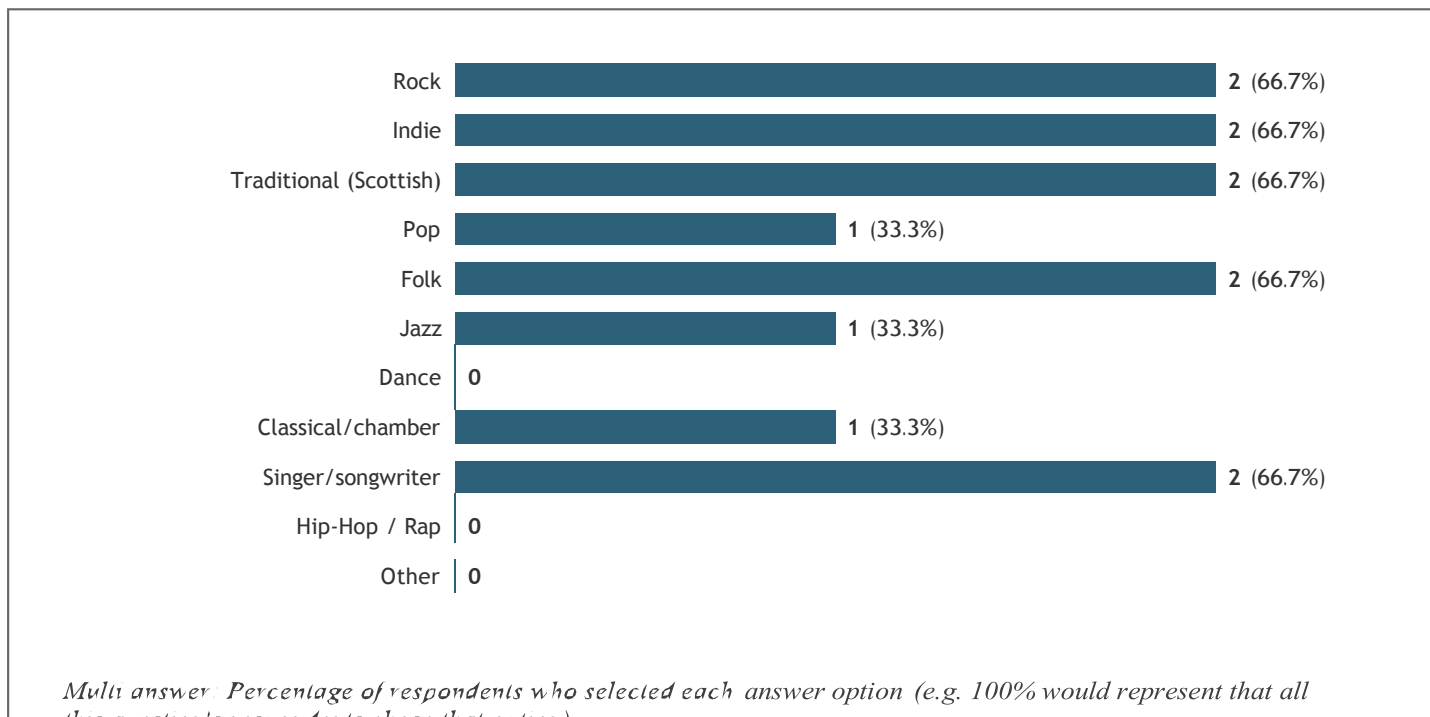
**13** What best describes your business setup?



13.a If you selected Other, please specify:

No responses

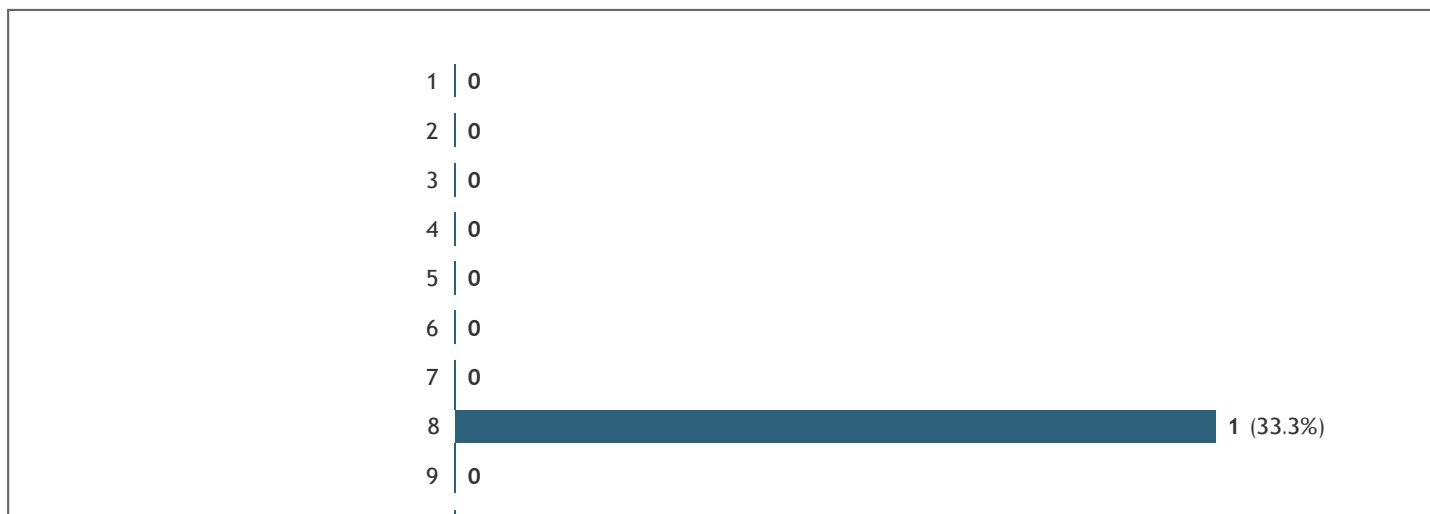
14 What genres of music does your work encompass? (please select all that apply)



14.a If you selected Other, please specify:

No responses

15 How many years has your business been trading?

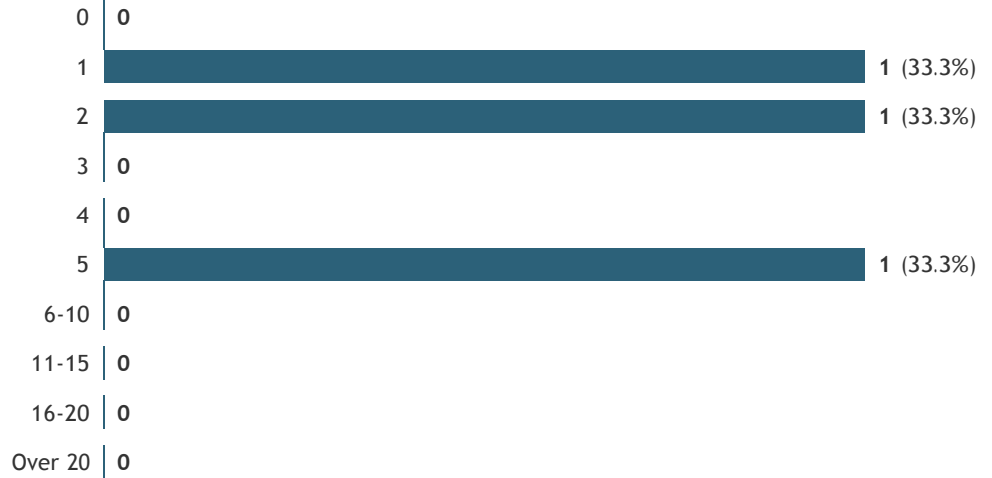


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47		0	
48		0	

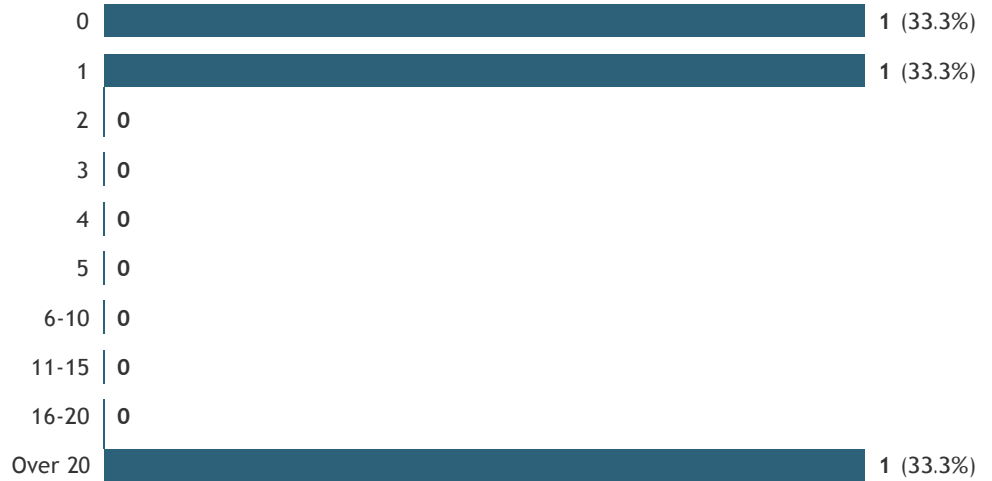
49 | 0

50 | 0

16 How many full-time staff are employed at your company?

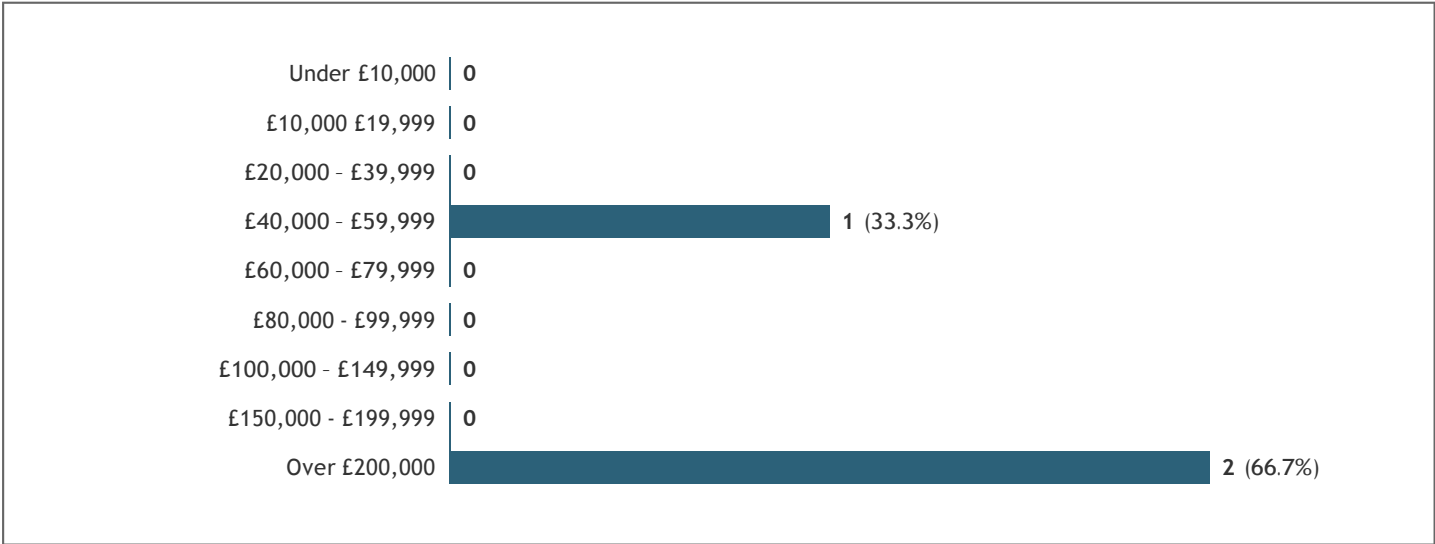


17 How many part-time staff are employed at your company?

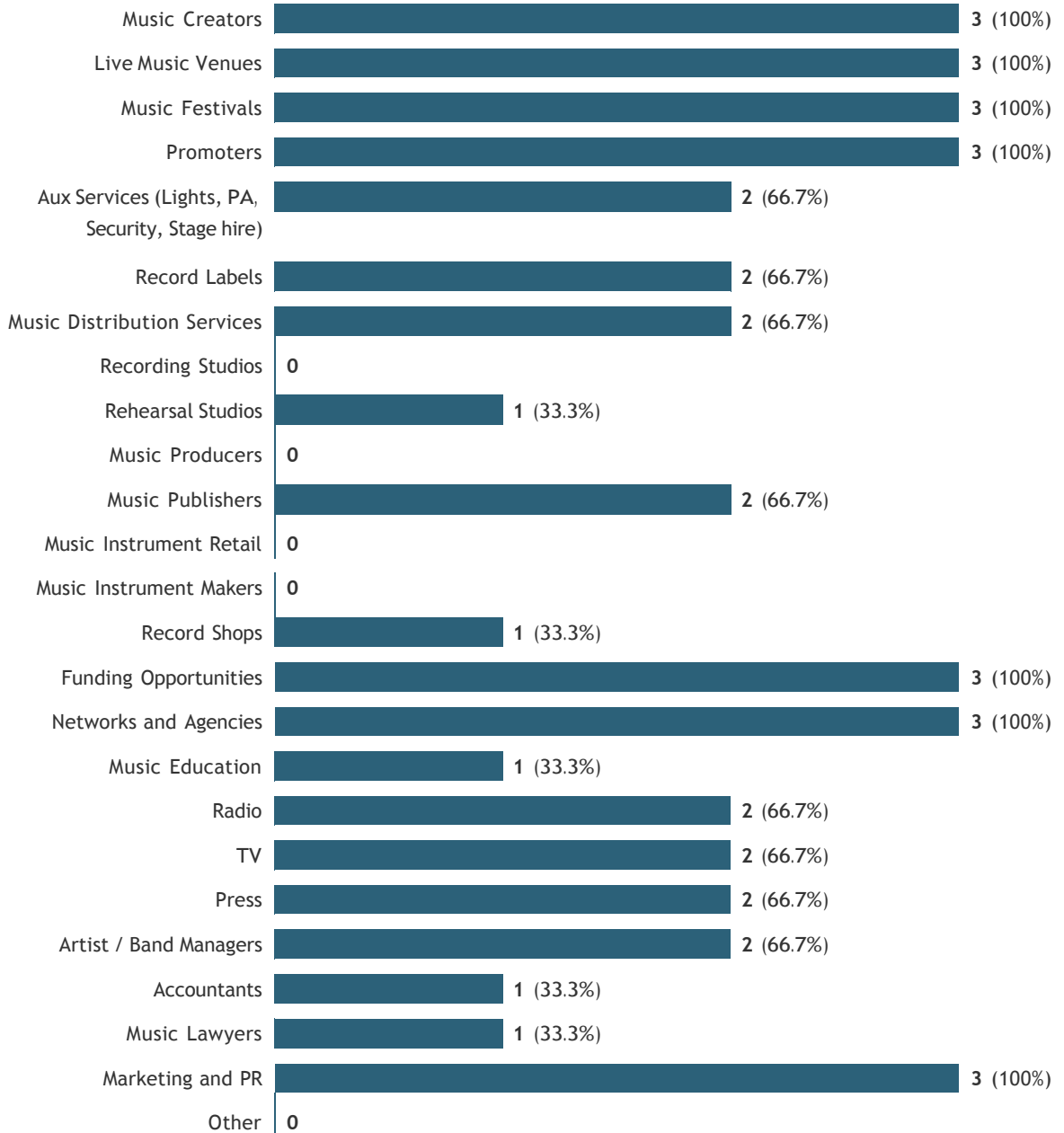


18 What was your companies income for 2018?





19 Which music industry stakeholders do you interact with? (please select all that apply)

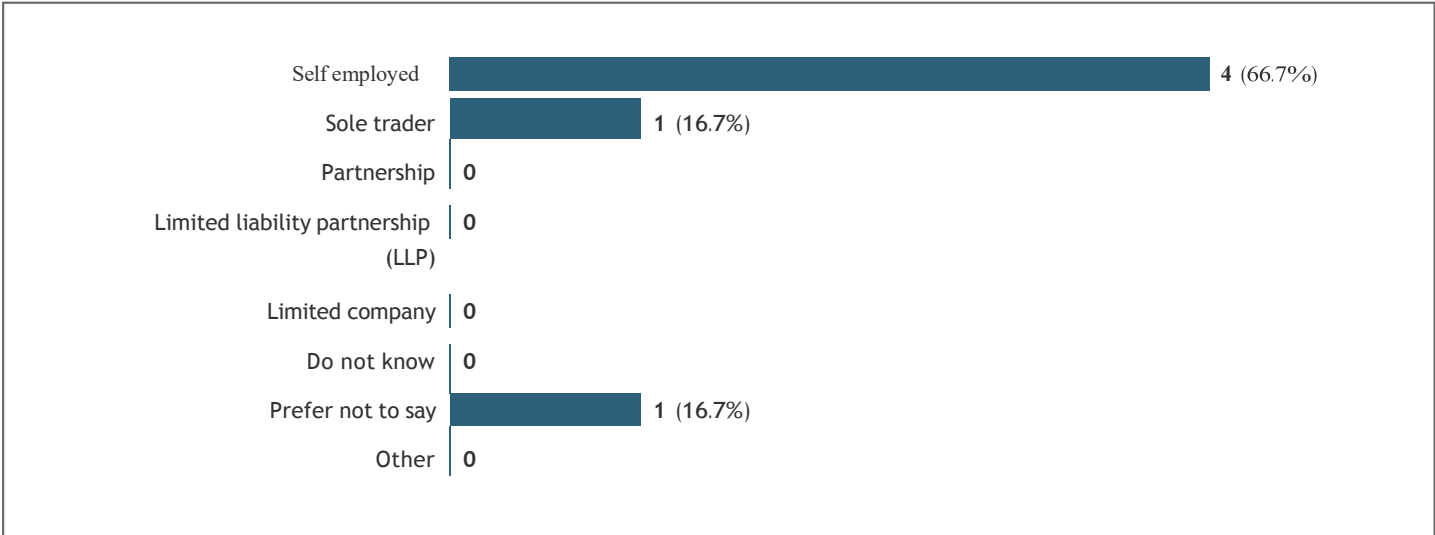


*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

19.a If you selected Other, please specify:

*No responses*

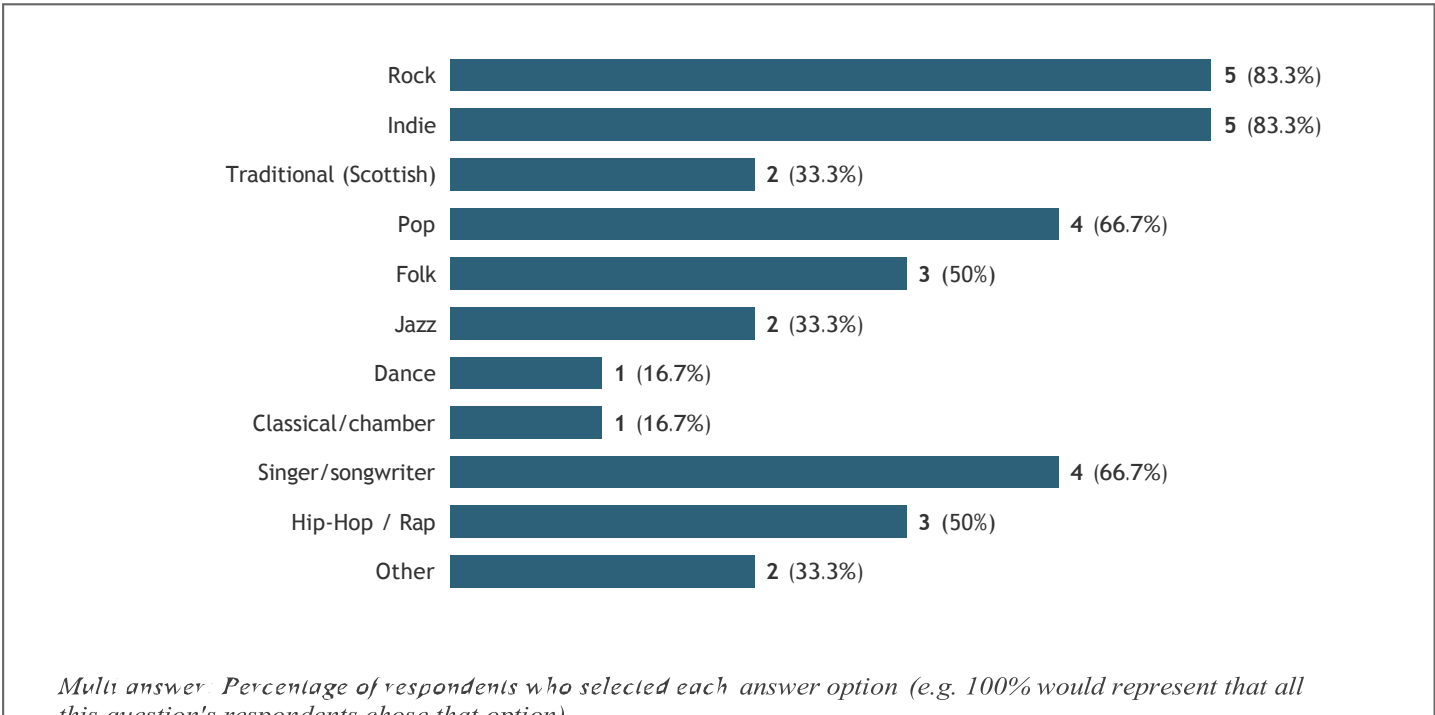
20 What best describes your business setup?



20.a If you selected Other, please specify:

*No responses*

21 What genres of music does your work encompass? (please select all that apply)



21.a If you selected Other, please specify:

Showing all 2 responses

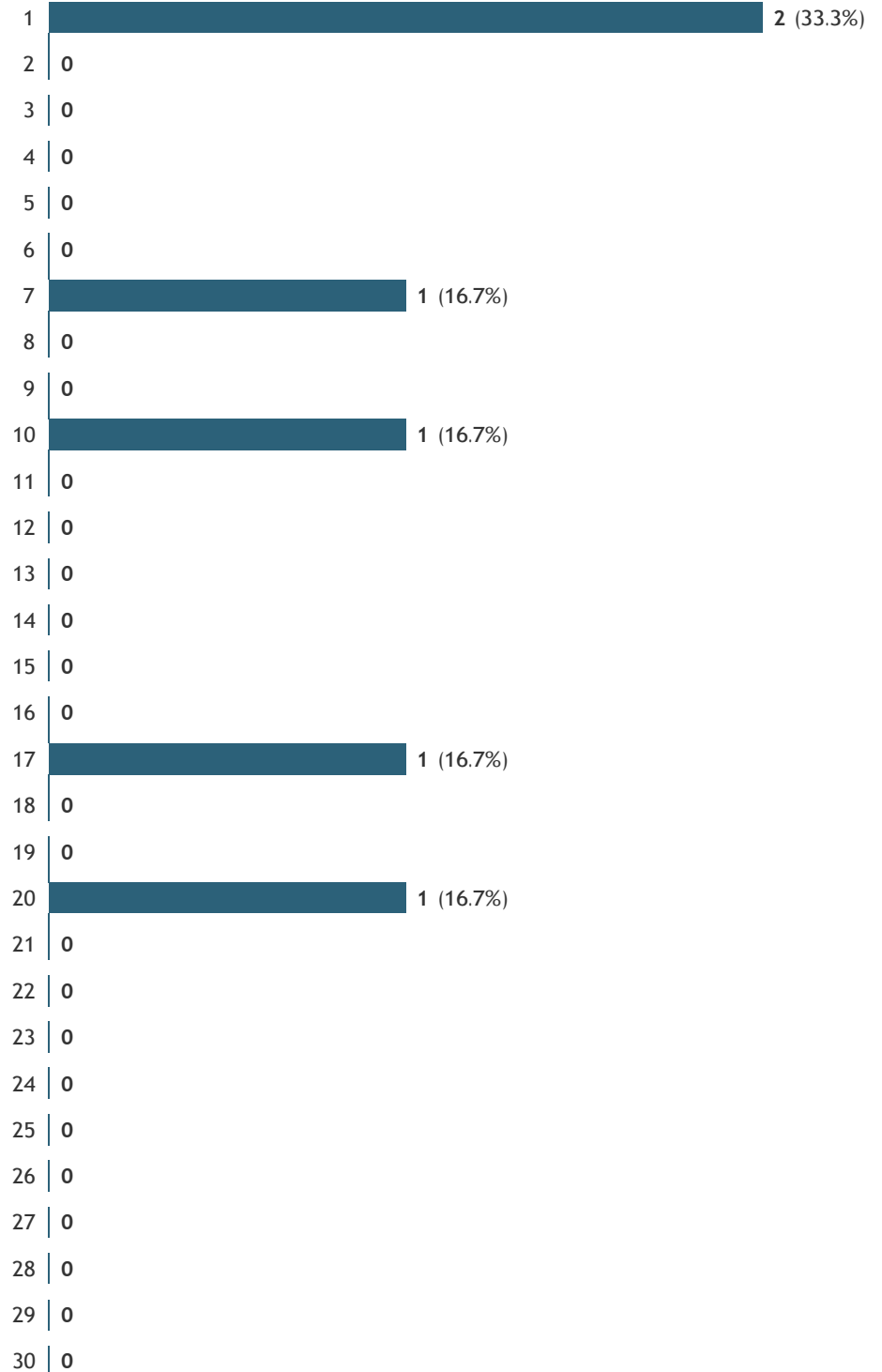
punk, post-punk, dreampop, alternative

741178-741169-81494404

Experimental / Electronic

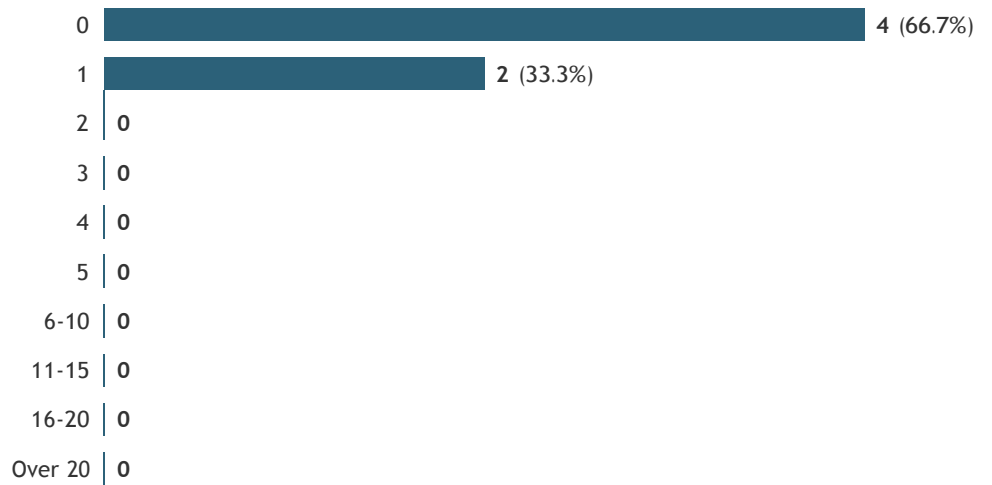
741178-741169-82512047

22 How many years has your business been trading?



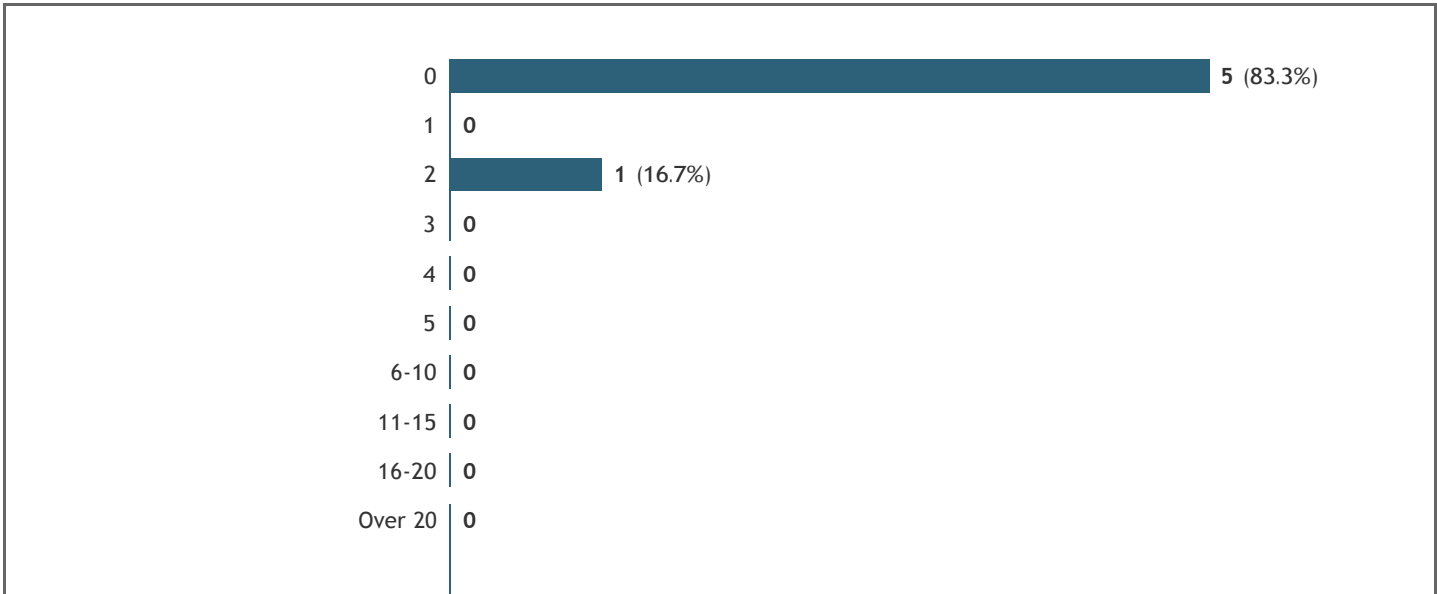
31 | 0  
32 | 0  
33 | 0  
34 | 0  
35 | 0  
36 | 0  
37 | 0  
38 | 0  
39 | 0  
40 | 0  
41 | 0  
42 | 0  
43 | 0  
44 | 0  
45 | 0  
46 | 0  
47 | 0  
48 | 0  
49 | 0  
50 | 0

**23** How many full-time staff are employed at your company?

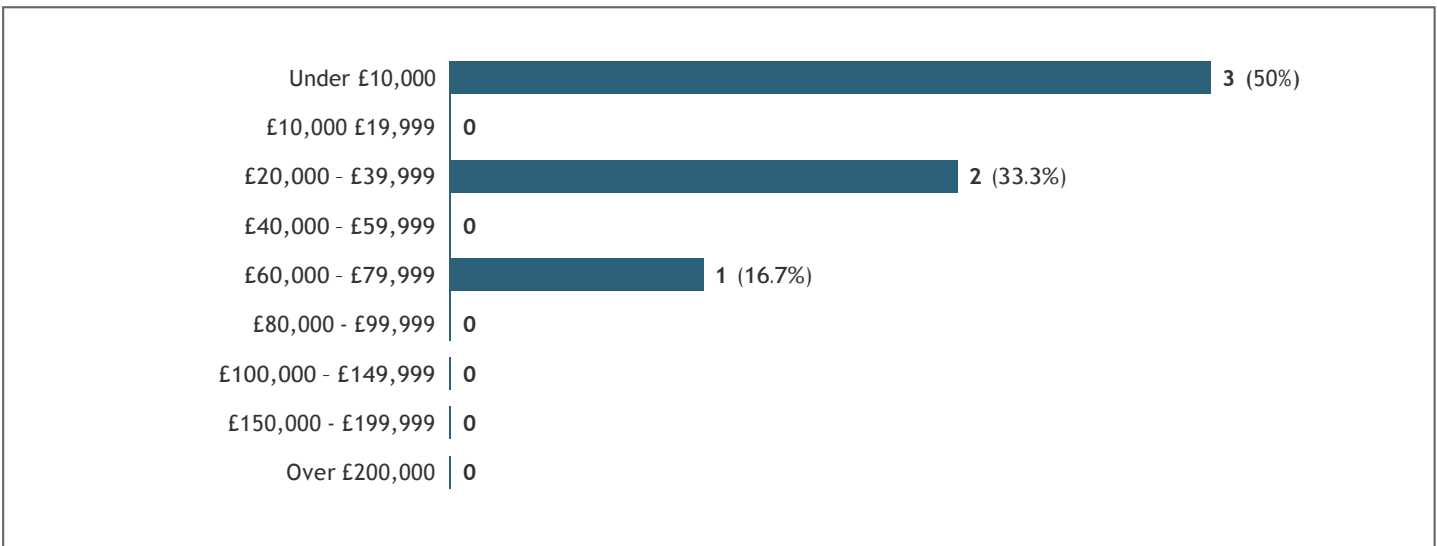


**24** How many part-time staff are employed at your company?

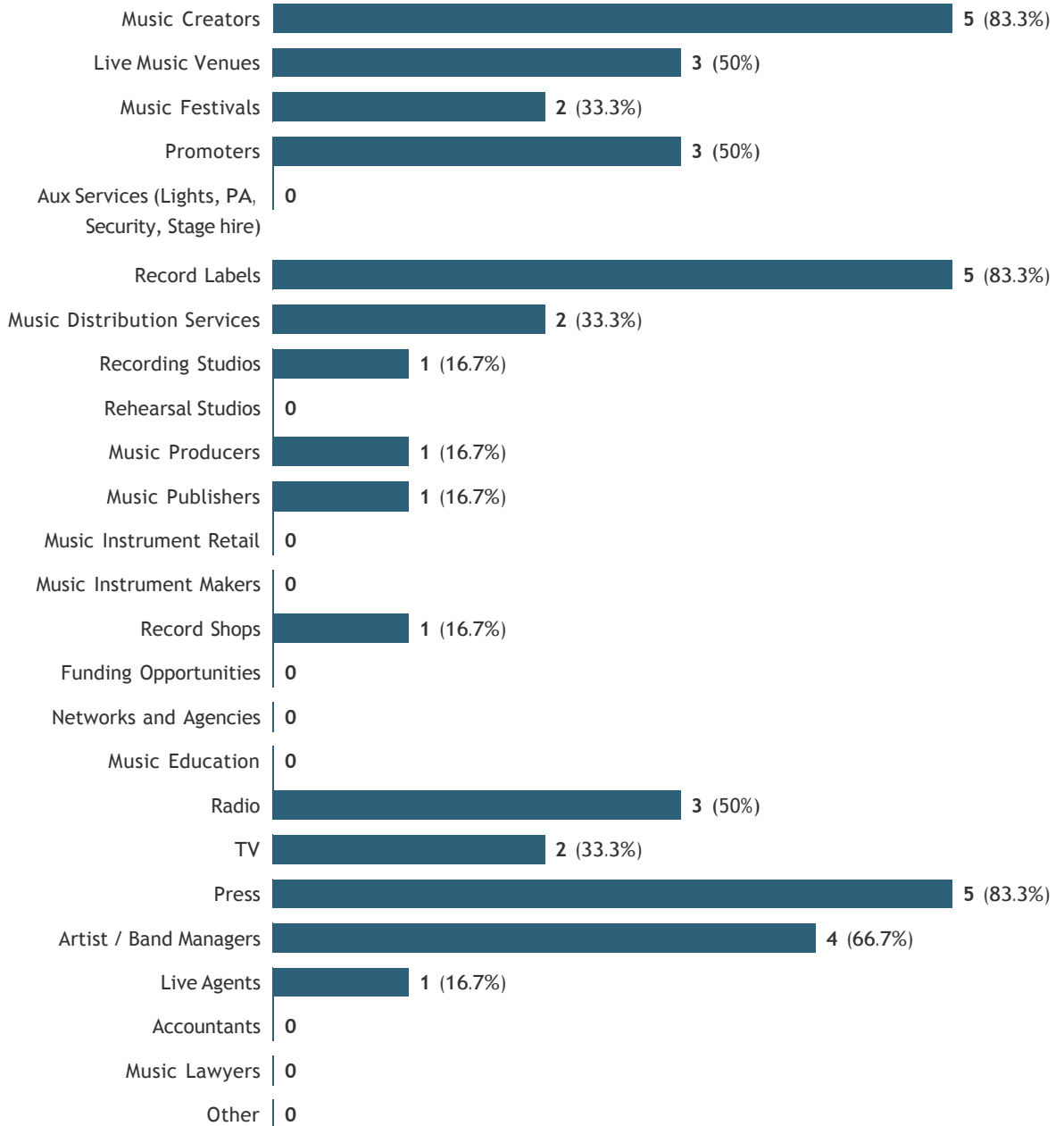
24



25 What was your companies income for 2018?



26 Which music industry stakeholders do you interact with? (please select all that apply)

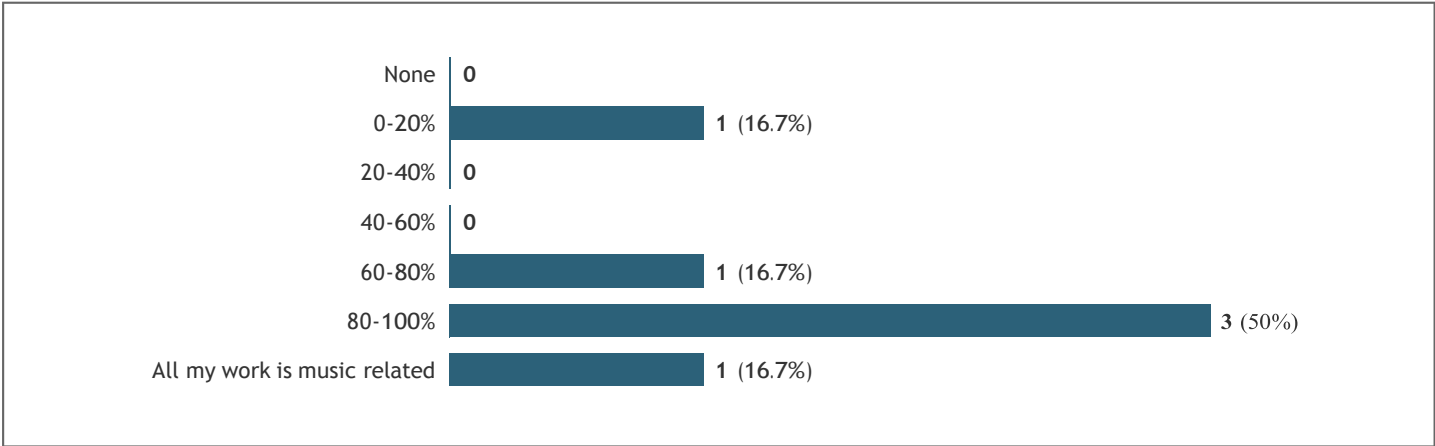


*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

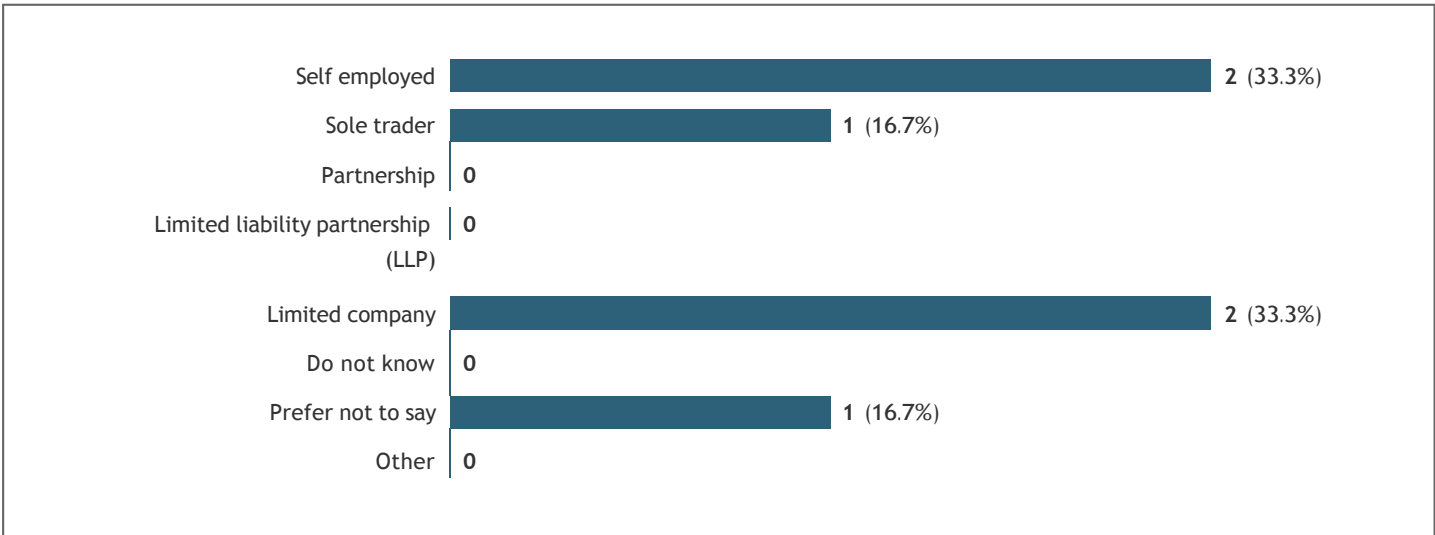
26.a If you selected Other, please specify:

*No responses*

27 What percentage of your workload is music related?



**28** What best describes your business setup?

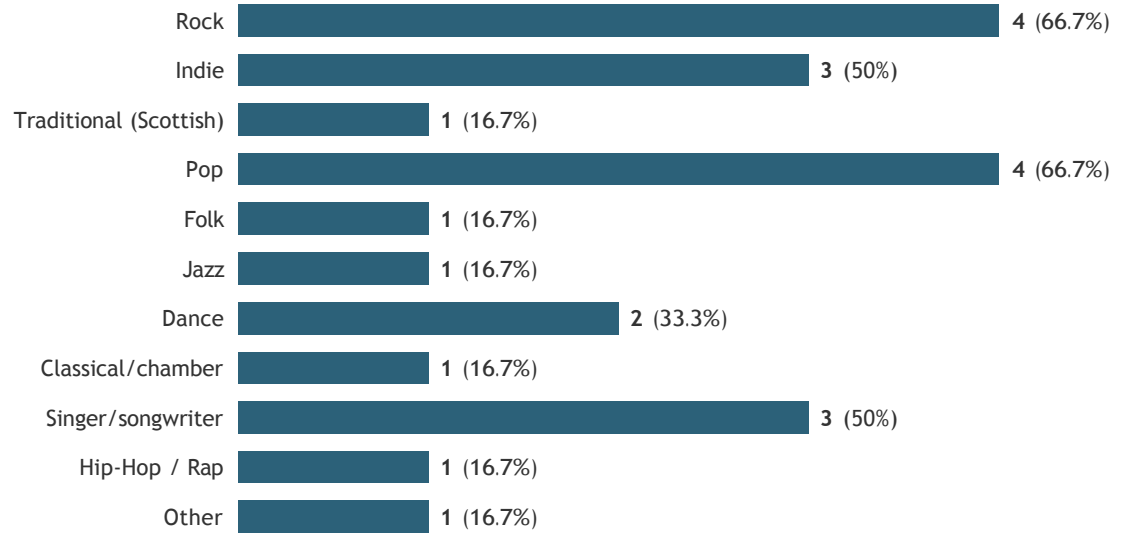


**28.a** If you selected Other, please specify:

*No responses*

**29** What genres of music does your work encompass? (please select all that apply)





*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all the question's respondents chose that option)*

29.a If you selected Other, please specify:

Showing 1 response

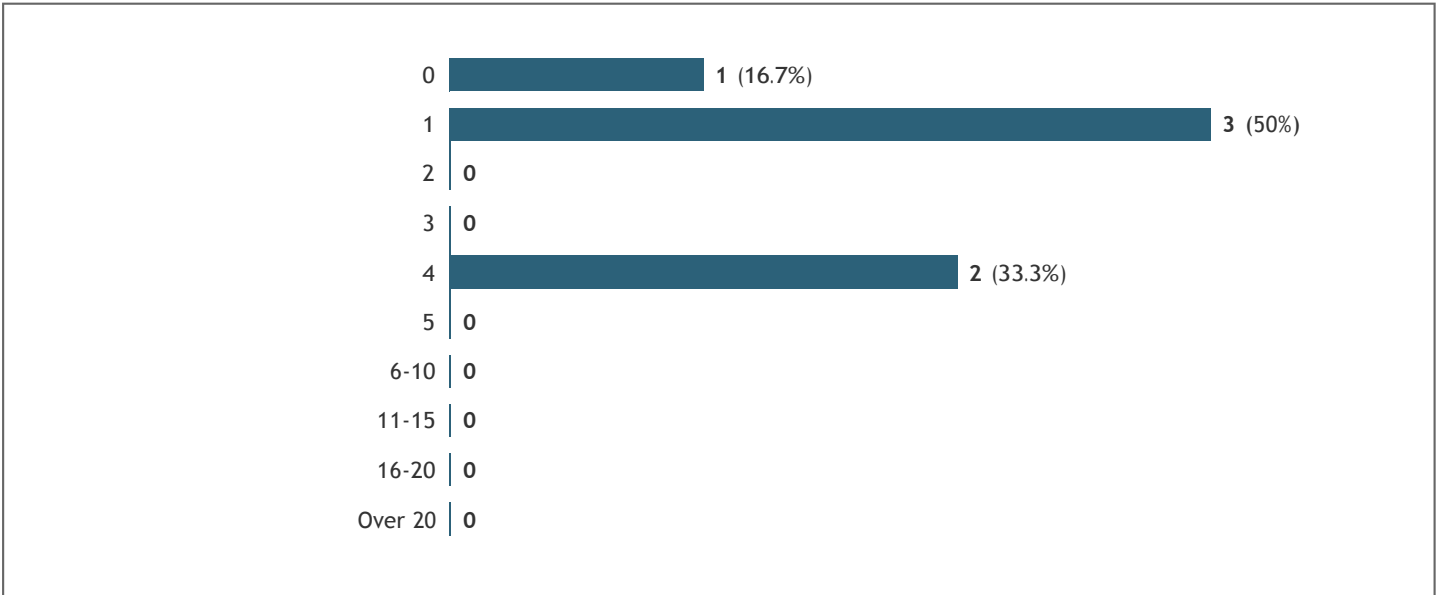
Various [741178-741169-81765350](#)

30 How many years have you been a manager?

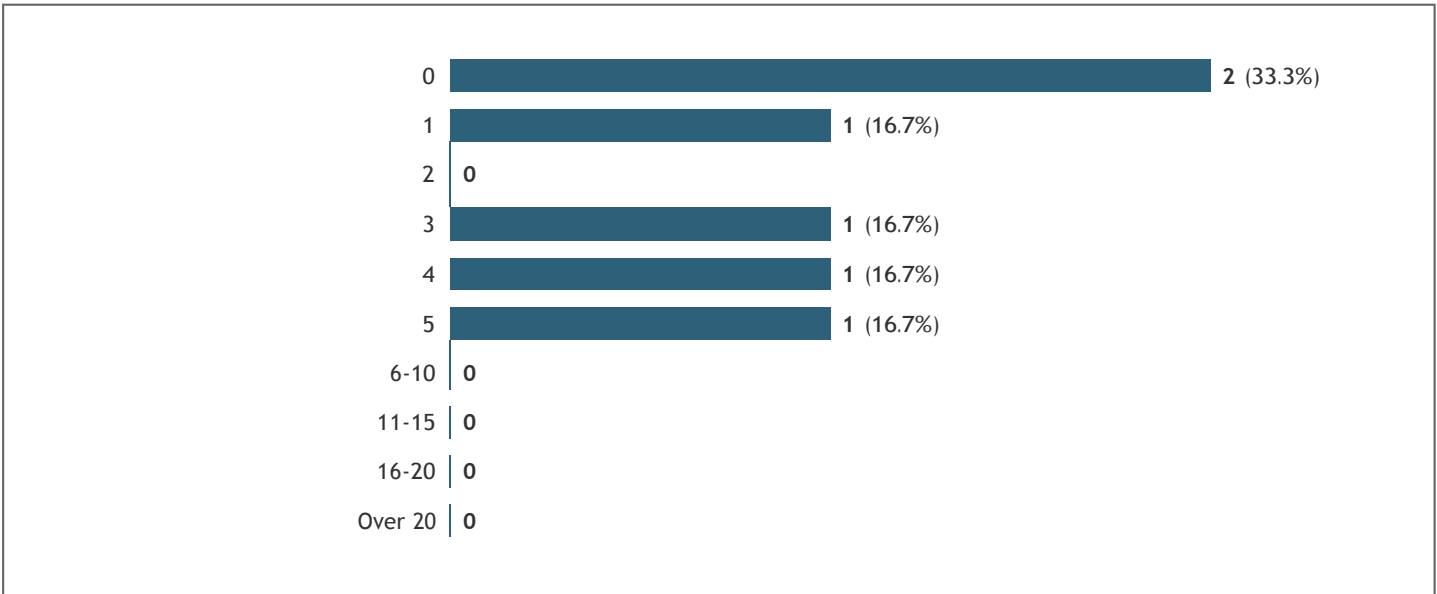


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17		0	
18		0	
19		0	
20		0	
21		0	
22		0	
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24		0	
25		0	
26		0	
27		0	
28		0	
29		0	
30		1	(16.7%)
31		0	
32		0	
33		0	
34		0	
35		0	
36		0	
37		0	
38		0	
39		0	
40		0	
41		0	
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46		0	
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48		0	
49		0	
50		0	

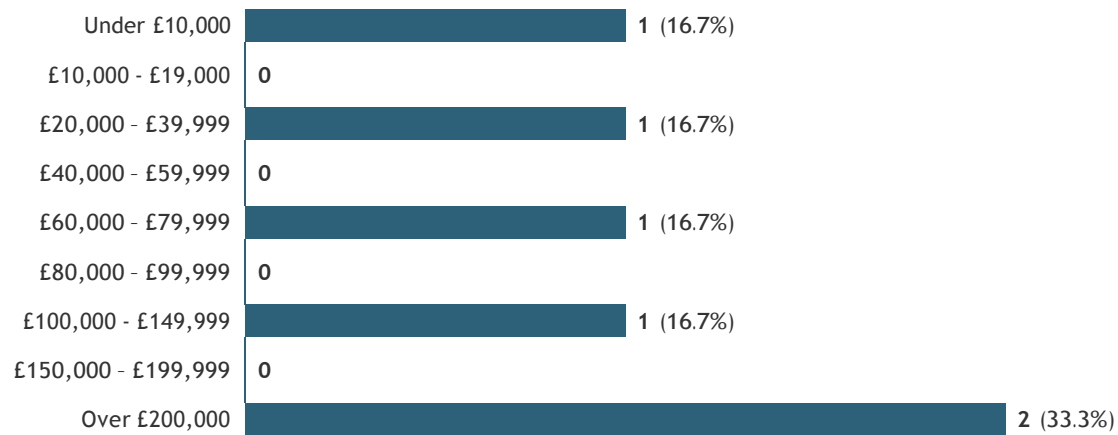
**31** How many full-time staff are employed at your company?



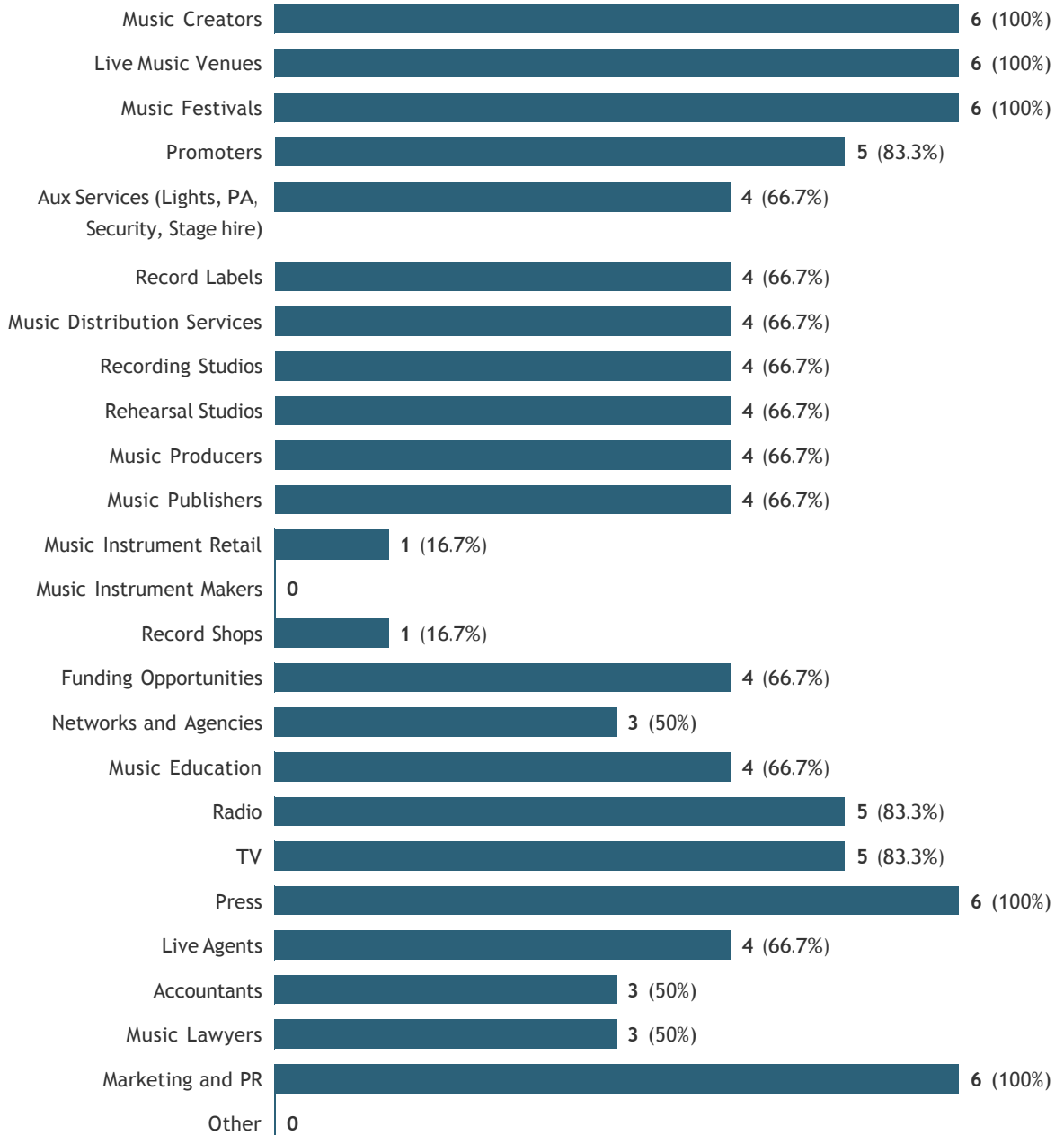
**32** How many part-time staff are employed at your company?



**33** What was your companies income for 2018?



34 Which music industry stakeholders do you interact with? (please select all that apply)

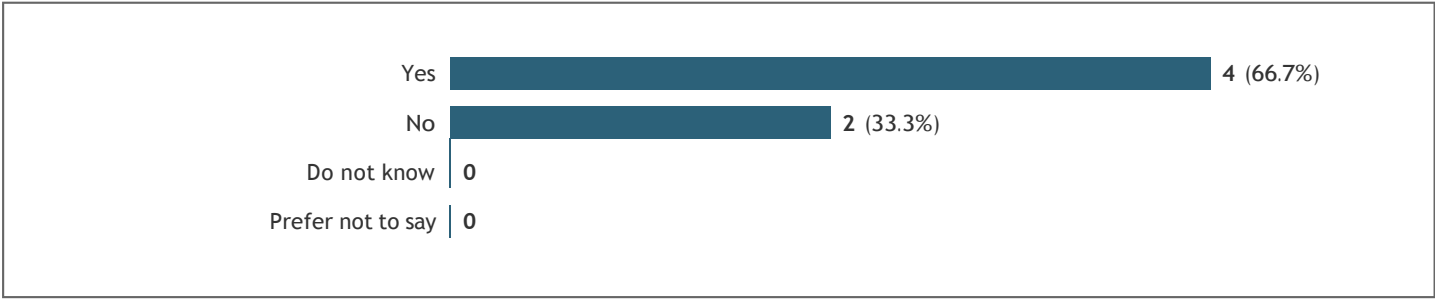


*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

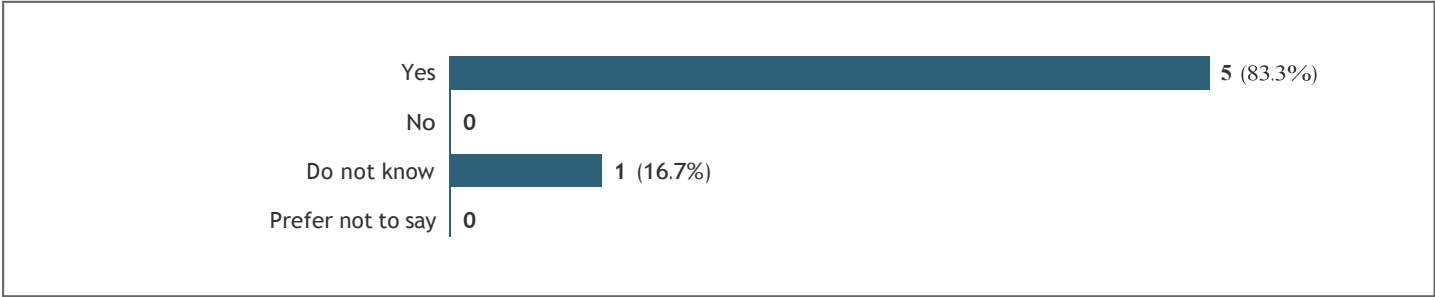
34.a If you selected Other, please specify:

*No responses*

35 Have you invested personal funds to develop your artists' careers?



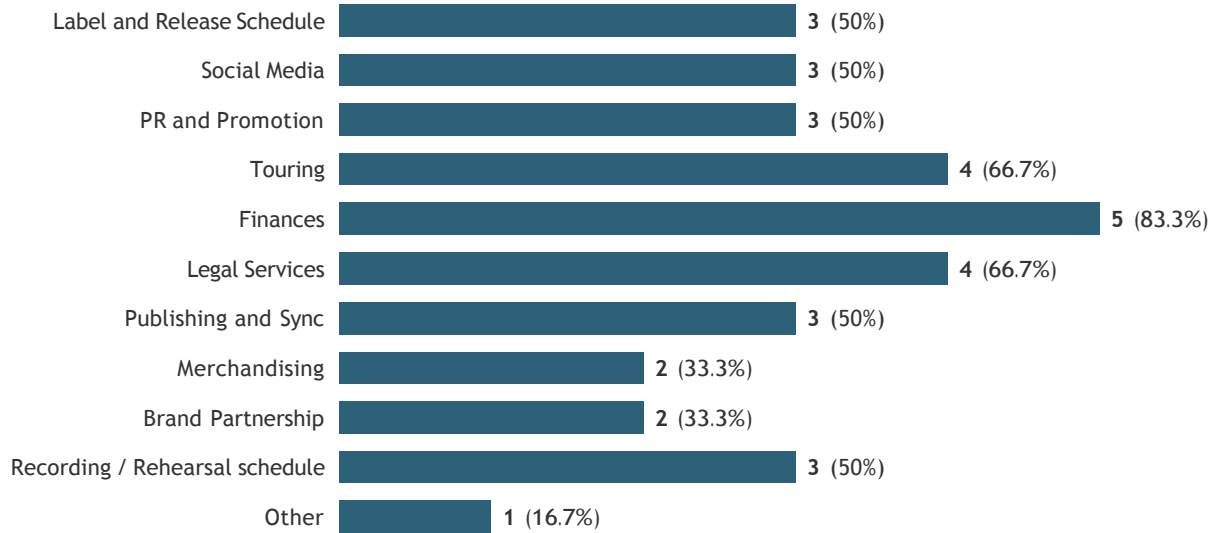
**36** Do you take an active role in looking after the mental wellbeing of your artists?



**36.a** If you selected Yes, could you elaborate on your actions?

Showing all 4 responses	
It's more important than the music. With poor mental health nothing is possible.	<a href="#">741178-741169-81333834</a>
I set up an organisation called Support Act and put four individuals from all areas of the music business through rehab.	<a href="#">741178-741169-81335070</a>
Our whole team have been trained in mental health first aid, and have assisted in various mental health crisis situations for our artists.	<a href="#">741178-741169-81336416</a>
Wellbeing and regular support, also established Disabled Artist Network	<a href="#">741178-741169-81765350</a>

**37** As a manager, which of the following roles do you carry out? (please select all that apply)



*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all the question's respondents chose that option)*

37.a If you selected Other, please specify:

Showing 1 response

Development and support for disabled artists & ensembles

[741178-741169-81765350](tel:741178-741169-81765350)

38 Please select which area you work



39 What best describes your business setup?

Self employed		0
Sole trader		0
Partnership		0
Limited liability partnership (LLP)		0
Limited company		0
Do not know		0
Prefer not to say		0
Other		0

39.a If you selected Other, please specify:

*No responses*

40 How many years has your business been trading?

1		0
2		0
3		0
4		0
5		0
6		0
7		0
8		0
9		0
10		0
11		0
12		0
13		0
14		0
15		0
16		0
17		0
18		0
19		0
20		0



21 | 0  
22 | 0  
23 | 0  
24 | 0  
25 | 0  
26 | 0  
27 | 0  
28 | 0  
29 | 0  
30 | 0  
31 | 0  
32 | 0  
33 | 0  
34 | 0  
35 | 0  
36 | 0  
37 | 0  
38 | 0  
39 | 0  
40 | 0  
41 | 0  
42 | 0  
43 | 0  
44 | 0  
45 | 0  
46 | 0  
47 | 0  
48 | 0  
49 | 0  
50 | 0

---

**41** How many full-time staff are employed at your company?

0		0
1		0
2		0
3		0
4		0
5		0
6-10		0
11-15		0
16-20		0
Over 20		0

---

**42** How many part-time staff are employed at your company?

0		0
1		0
2		0
3		0
4		0
5		0
6-10		0
11-15		0
16-20		0
Over 20		0

---

**43** What was your income for 2018?

Under £19,999		0
£20,000 – £29,999		0
£30,000 – £39,999		0
£40,000 – £49,999		0
£50,000 – £69,999		0
£70,000 - £99,999		0
£100,000 – £119,999		0
£120,000 - £149,999		0
£150,000 - £199,999		0
Over £200,000		0

---

**44** Which music industry stakeholders do you interact with? (please select all that apply)

Music Creators	0
Live Music Venues	0
Music Festivals	0
Promoters	0
Aux Services (Lights, PA, Security, Stage hire)	0
Record Labels	0
Music Distribution Services	0
Recording Studios	0
Rehearsal Studios	0
Music Producers	0
Music Publishers	0
Music Instrument Retail	0
Record Shops	0
Funding Opportunities	0
Networks and Agencies	0
Music Education	0
Radio	0
TV	0
Press	0
Artist / Band Managers	0
Live Agents	0
Accountants	0
Music Lawyers	0
Marketing and PR	0
Other	0

*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

44.a If you selected Other, please specify:

*No responses*

45 Do you sell your products on the internet?

Yes		0
No		0
Do not know		0
Prefer not to say		0

45.a If you selected Yes, would your company be able to trade without the revenue from online sales?

*No responses*

46 Do you sell instruments outwith Scotland?

Yes		0
No		0
Do not know		0
Prefer not to say		0

46.a If you selected Yes, please specify what percentage of sales are international.

*No responses*

47 What best describes your business setup?

Self employed		0
Sole trader		0
Partnership		0
Limited liability partnership (LLP)		0
Limited company		0
Do not know		0
Prefer not to say		0
Other		0

---

47.a If you selected Other, please specify:

*No responses*

---

48 How many years has your business been trading?

1	0
2	0
3	0
4	0
5	0
6	0
7	0
8	0
9	0
10	0
11	0
12	0
13	0
14	0
15	0
16	0
17	0
18	0
19	0
20	0
21	0
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23	0
24	0
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27	0
28	0
29	0
30	0
31	0
32	0

33		0
34		0
35		0
36		0
37		0
38		0
39		0
40		0
41		0
42		0
43		0
44		0
45		0
46		0
47		0
48		0
49		0
50		0

49 How many full-time staff are employed at your company?

0		0
1		0
2		0
3		0
4		0
5		0
6-10		0
11-15		0
16-20		0
Over 20		0

50 How many part-time staff are employed at your company?

0		0
1		0
2		0
3		0
4		0
5		0
6-10		0
11-15		0
16-20		0
Over 20		0

**51** What was your companies income for 2018?

Under £50,000		0
£50,000 – £99,999		0
£100,000 – £149,999		0
£150,000 – £199,999		0
£200,000 – £249,999		0
£300,000 - £349,999		0
£350,000 – £399,999		0
£400,000 - £449,999		0
£449,999 - £500,000		0
Over £500,000		0

**52** Which music industry stakeholders do you interact with? (please select all that apply)



Music Creators	0
Live Music Venues	0
Music Festivals	0
Promoters	0
Aux Services (Lights, PA, Security, Stage hire)	0
Record Labels	0
Music Distribution Services	0
Recording Studios	0
Rehearsal Studios	0
Music Producers	0
Music Publishers	0
Music Instrument Makers	0
Record Shops	0
Funding Opportunities	0
Networks and Agencies	0
Music Education	0
Radio	0
TV	0
Press	0
Artist / Band Managers	0
Live Agents	0
Accountants	0
Music Lawyers	0
Marketing and PR	0
Other	0

*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

52.a If you selected Other, please specify:

*No responses*

53 Do you sell your products on the internet?

Yes		0
No		0
Do not know		0
Prefer not to say		0

53.a If you selected Yes, would your company be able to trade without the revenue from online sales?

*No responses*

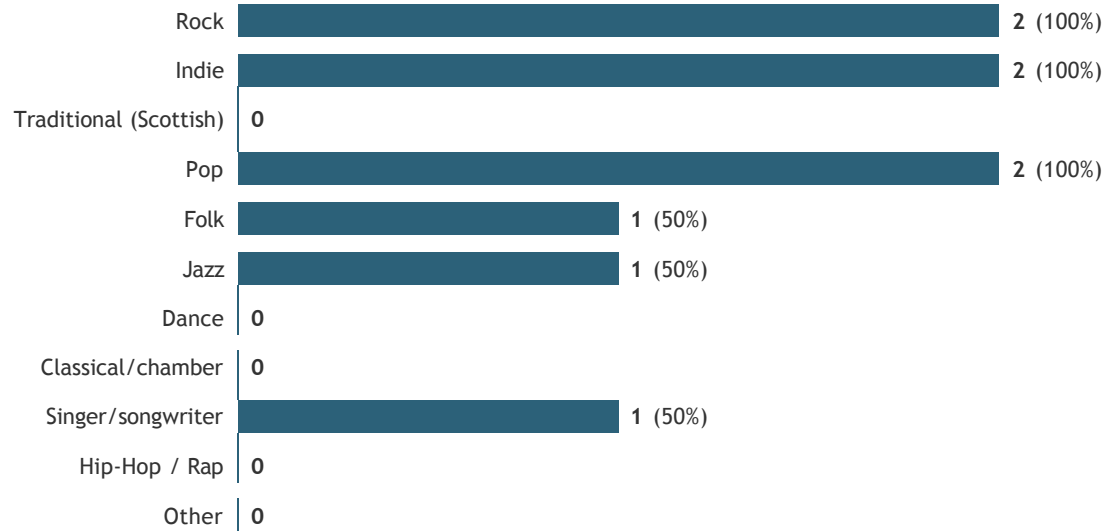
54 What best describes your business setup?

Self employed		0
Sole trader		2 (100%)
Partnership		0
Limited liability partnership (LLP)		0
Limited company		0
Do not know		0
Prefer not to say		0
Other		0

54.a If you selected Other, please specify:

*No responses*

55 What genres of music does your work encompass? (please select all that apply)

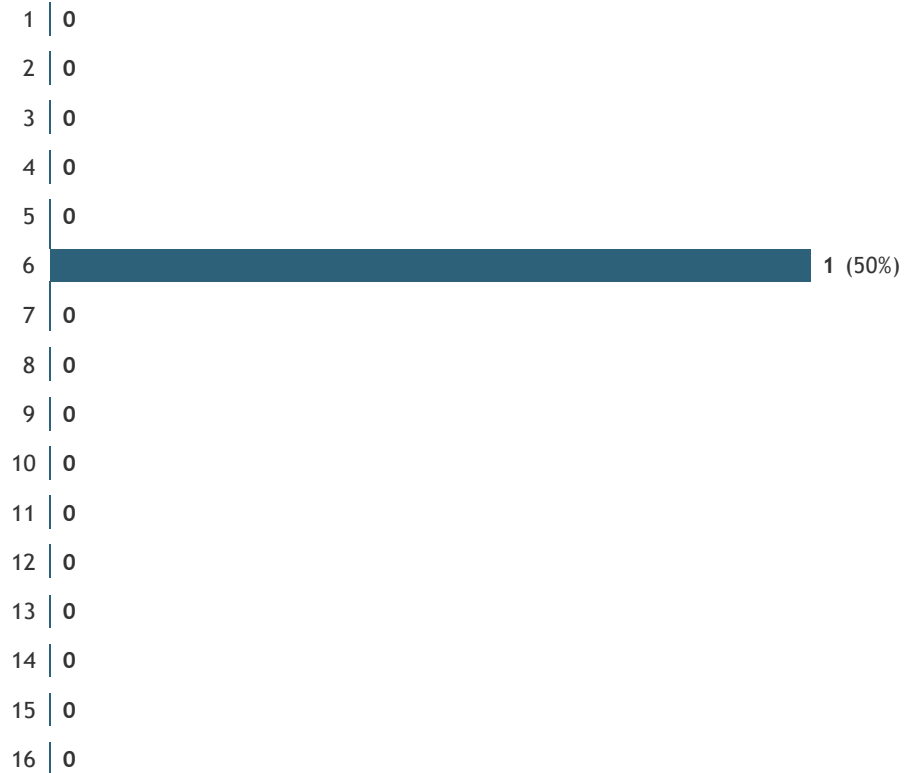


*Multi answer. Percentage of respondents who selected each answer option (e.g. 100% would represent that all the question's respondents chose that option)*

55.a If you selected Other, please specify:

*No responses*

56 How many years has your business been trading?



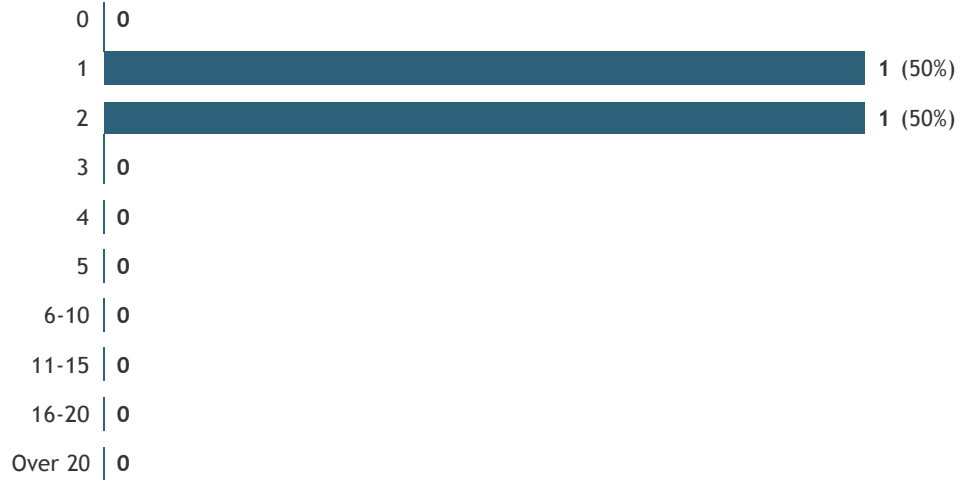
17 | 0  
18 | 0  
19 | 0  
20 | 0  
21 | 0  
22 | 0  
23 | 0  
24 | 0  
25  
26 | 0  
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28 | 0  
29 | 0  
30 | 0  
31 | 0  
32 | 0  
33 | 0  
34 | 0  
35 | 0  
36 | 0  
37 | 0  
38 | 0  
39 | 0  
40 | 0  
41 | 0  
42 | 0  
43 | 0  
44 | 0  
45 | 0  
46 | 0  
47 | 0  
48 | 0  
49 | 0  
50 | 0

1 (50%)

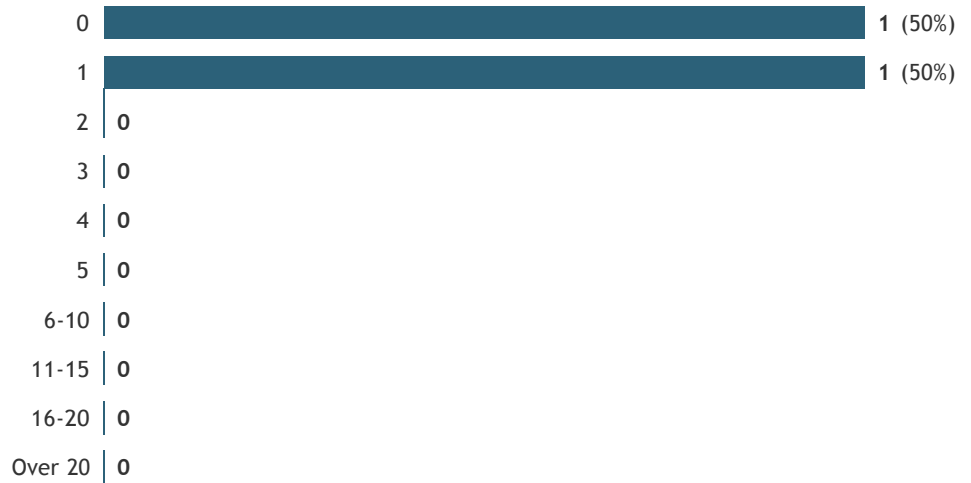
---

57 How many full-time staff are employed at your company?





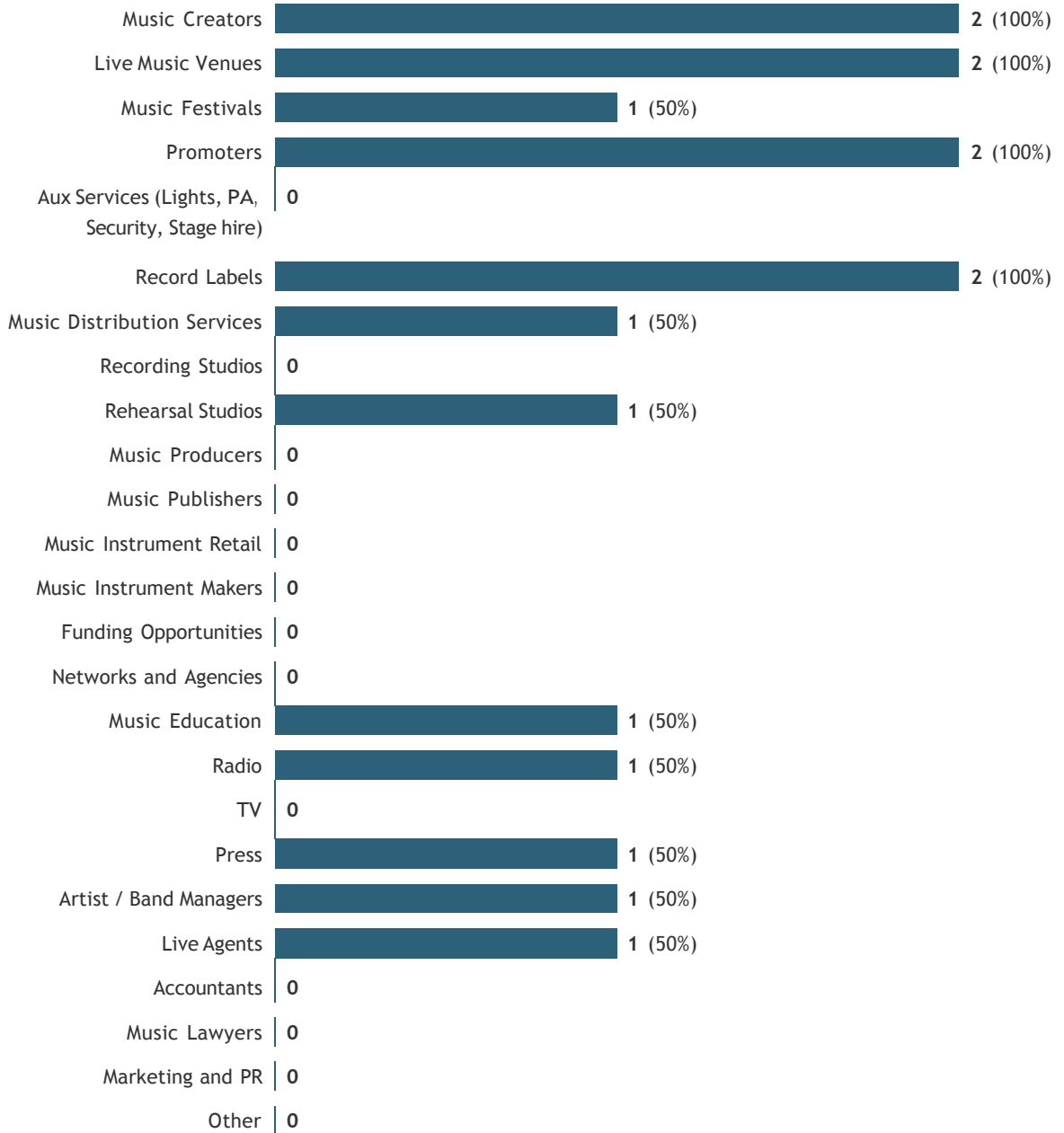
**58** How many part-time staff are employed at your company?



**59** What was your companies income for 2018?



60 Which music industry stakeholders do you interact with? (please select all that apply)



*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

60.a If you selected Other, please specify:

*No responses*

61 Do you sell your products on the internet?





61.a If you selected Yes, would your company be able to trade without the revenue from online sales?

Showing all 2 responses	
No	<a href="#">741178-741169-81349292</a>
No	<a href="#">741178-741169-81444357</a>

62 Does your record shop take part in Record Store Day?



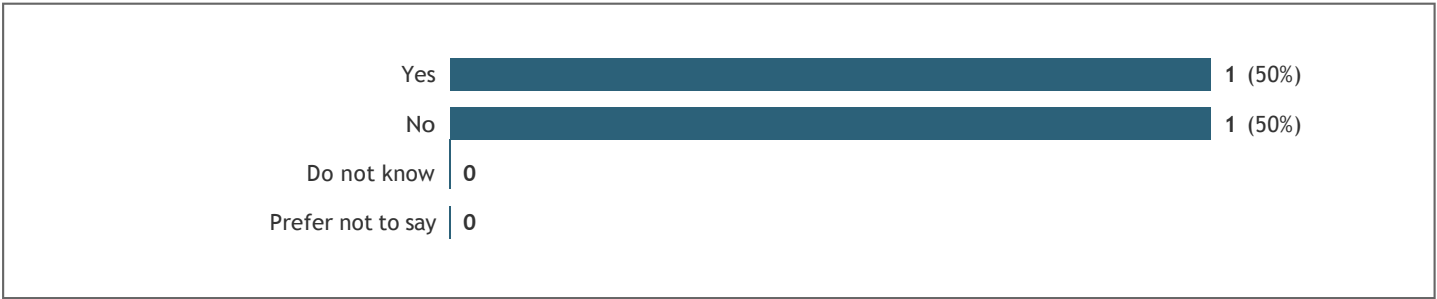
63 Does your record shop sell more than just physical music?



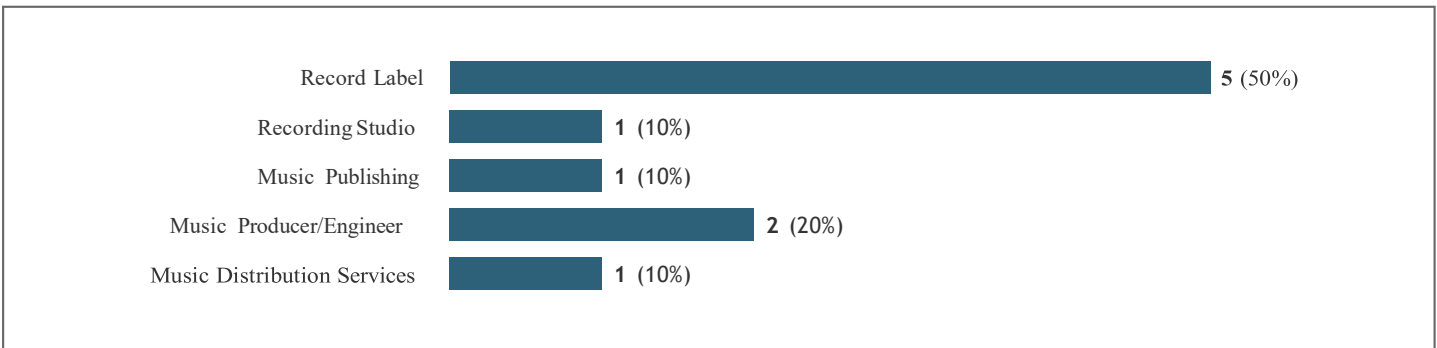
63.a If you selected Yes, please specify.. e.g., food, clothing.

Showing 1 response	
Clothing and music-related merchandise.	<a href="#">741178-741169-81349292</a>

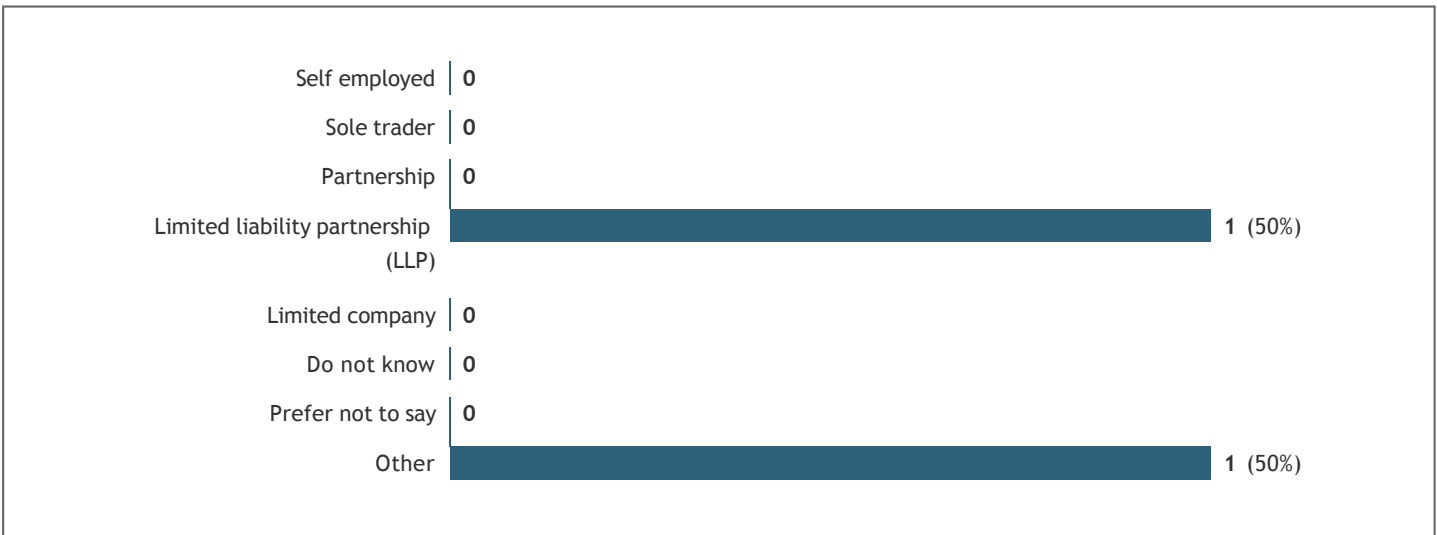
64 Does your store ever hold live performances from artists?



65 Please select your area of work



66 What best describes your business setup?

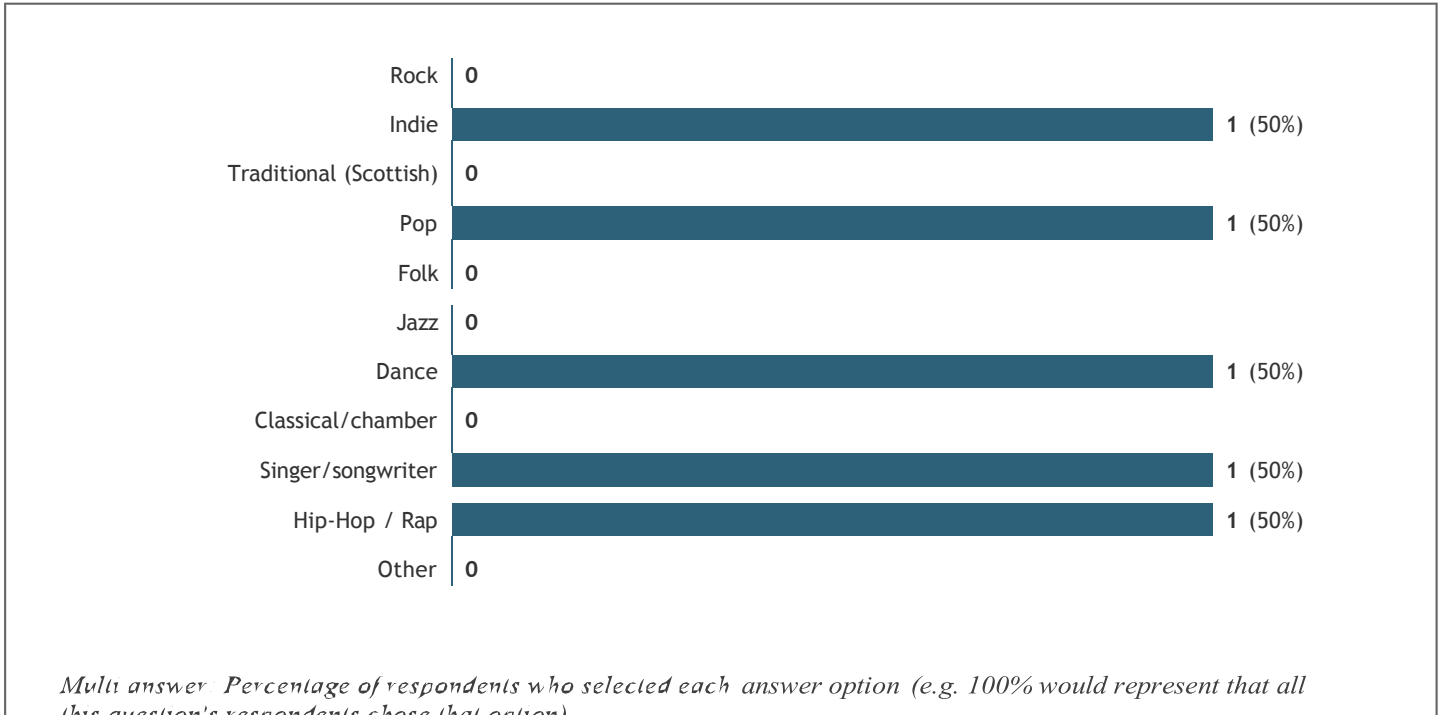


66.a If you selected Other, please specify:

Showing 1 response

I am EMPLOYED by a limited company. [741178-741169-81631556](tel:741178-741169-81631556)

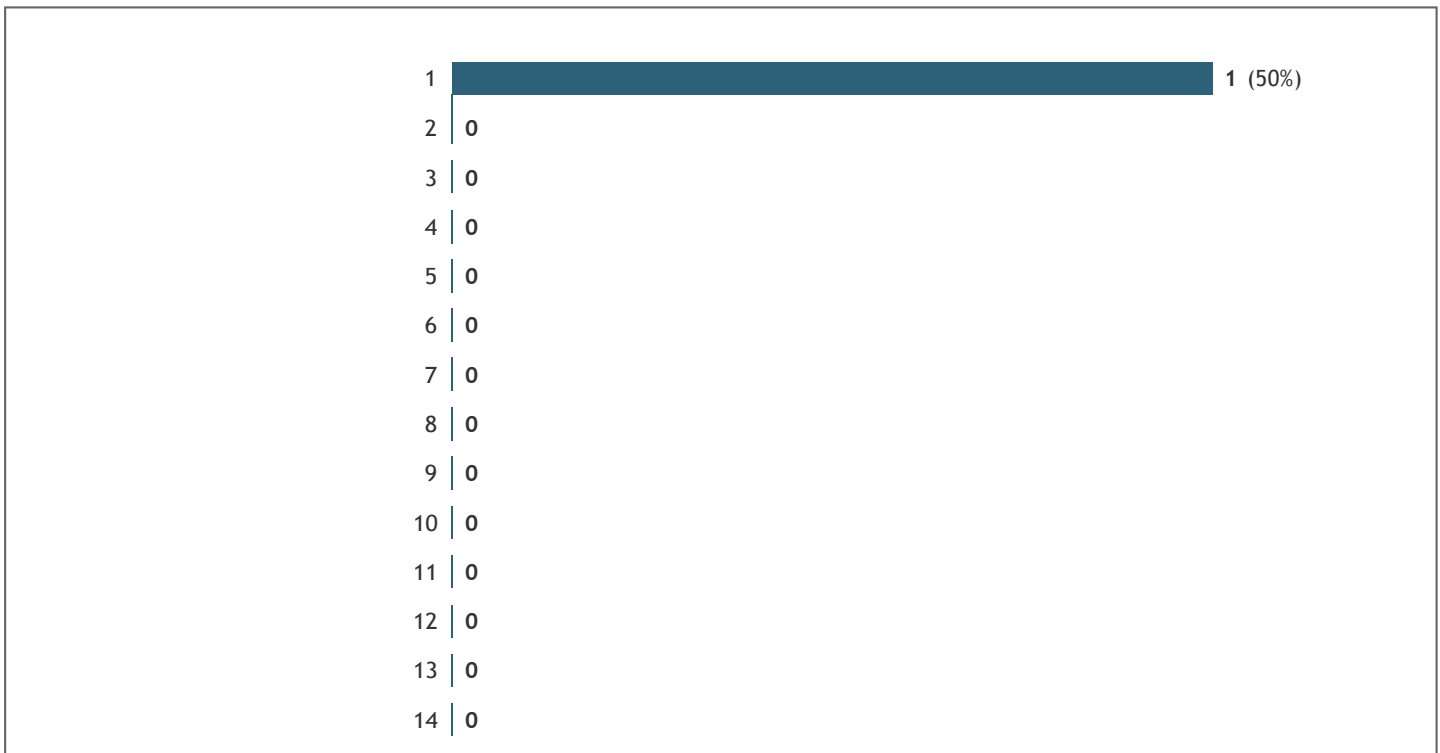
67 What genres of music does your work encompass? (please select all that apply)



67.a If you selected Other, please specify:

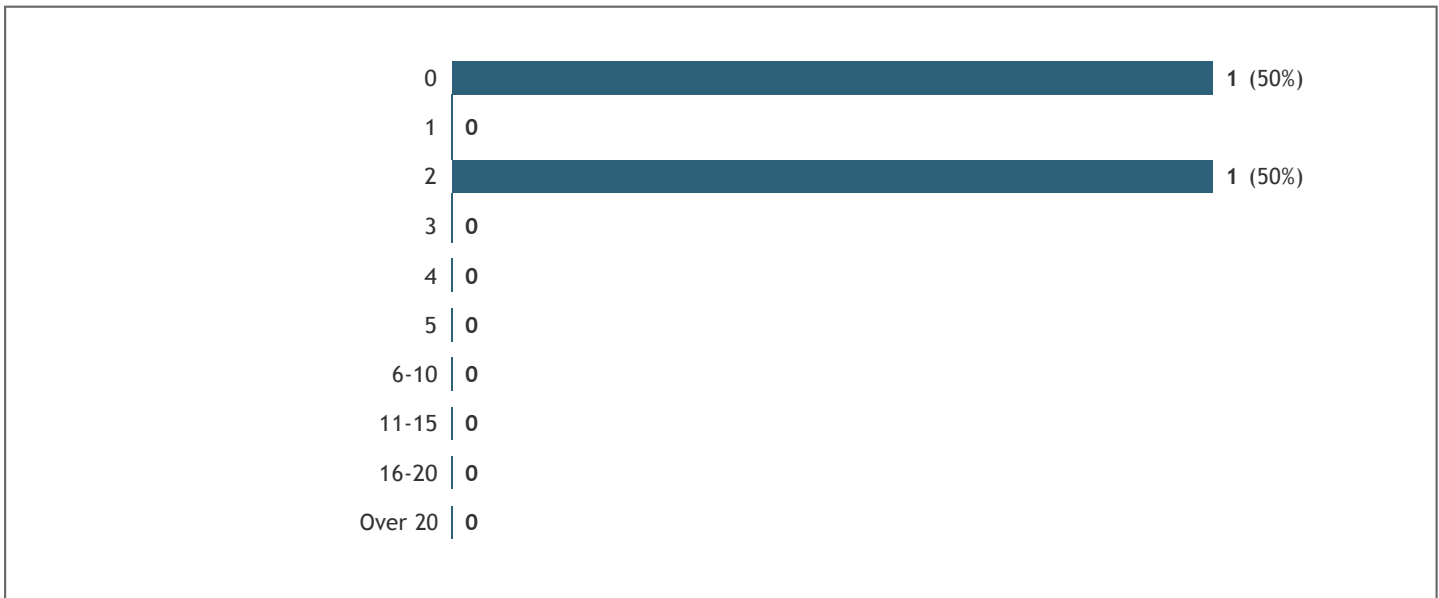
No responses

68 How many years has your business been trading?

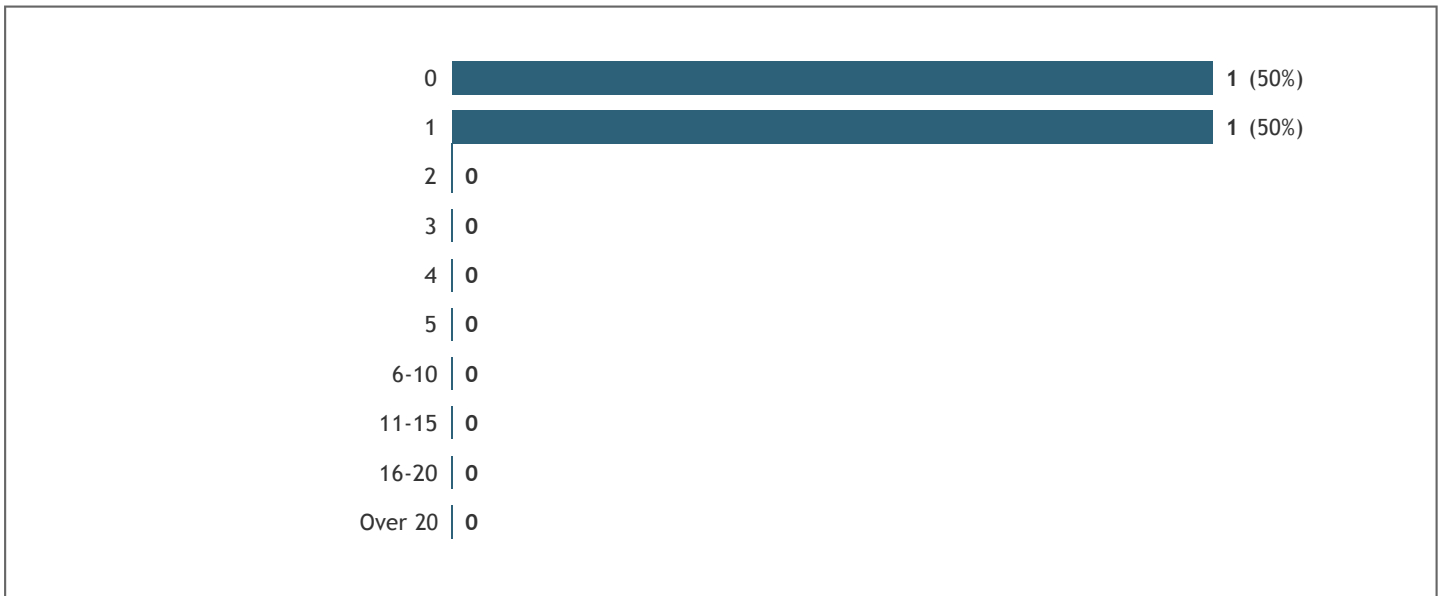


15		0	
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19		0	
20		0	
21		0	
22		0	
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24		0	
25		0	
26		0	
27		0	
28		1	(50%)
29		0	
30		0	
31		0	
32		0	
33		0	
34		0	
35		0	
36		0	
37		0	
38		0	
39		0	
40		0	
41		0	
42		0	
43		0	
44		0	
45		0	
46		0	
47		0	
48		0	
49		0	
50		0	

69 How many full-time staff are employed at your company?



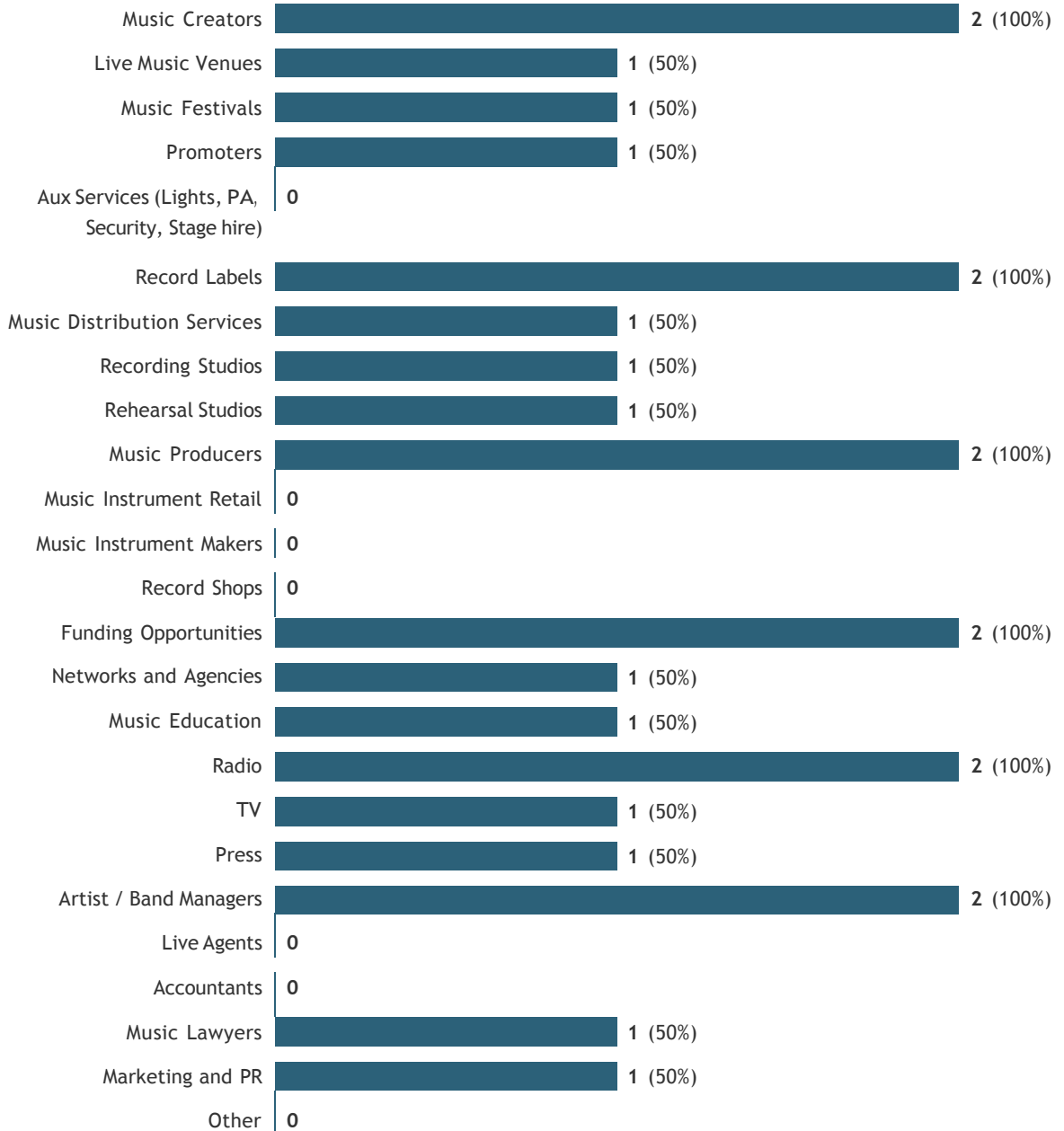
70 How many part-time staff are employed at your company?



71 What was your companies income for 2018?



72 Which music industry stakeholders do you interact with? (please select all that apply)



*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

72.a If you selected Other, please specify:

*No responses*

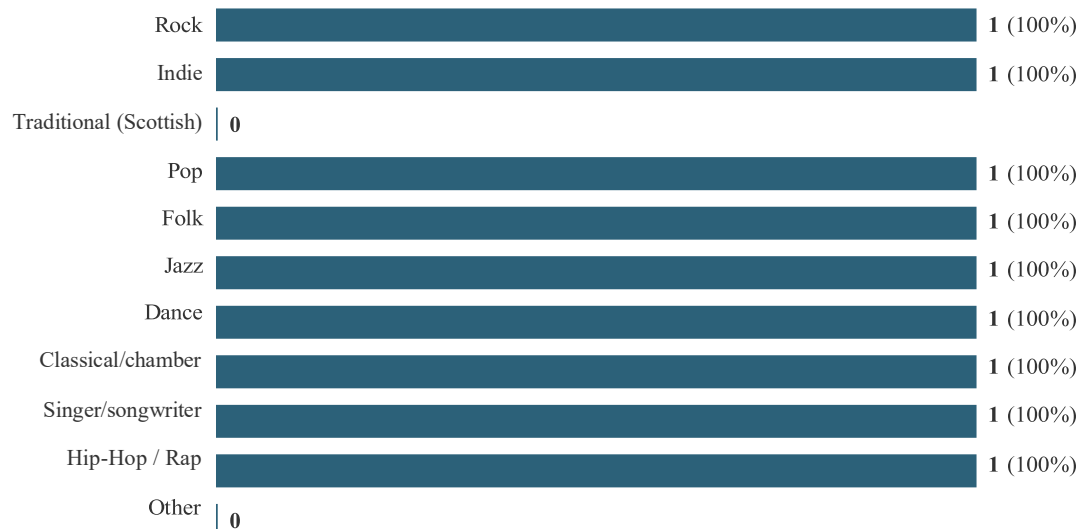
73 What best describes your business setup?



73.a If you selected Other, please specify:

*No responses*

74 What genres of music does your work encompass? (please select all that apply)



*Multi answer. Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

74.a If you selected Other, please specify:

*No responses*

75 How many years has your business been trading?



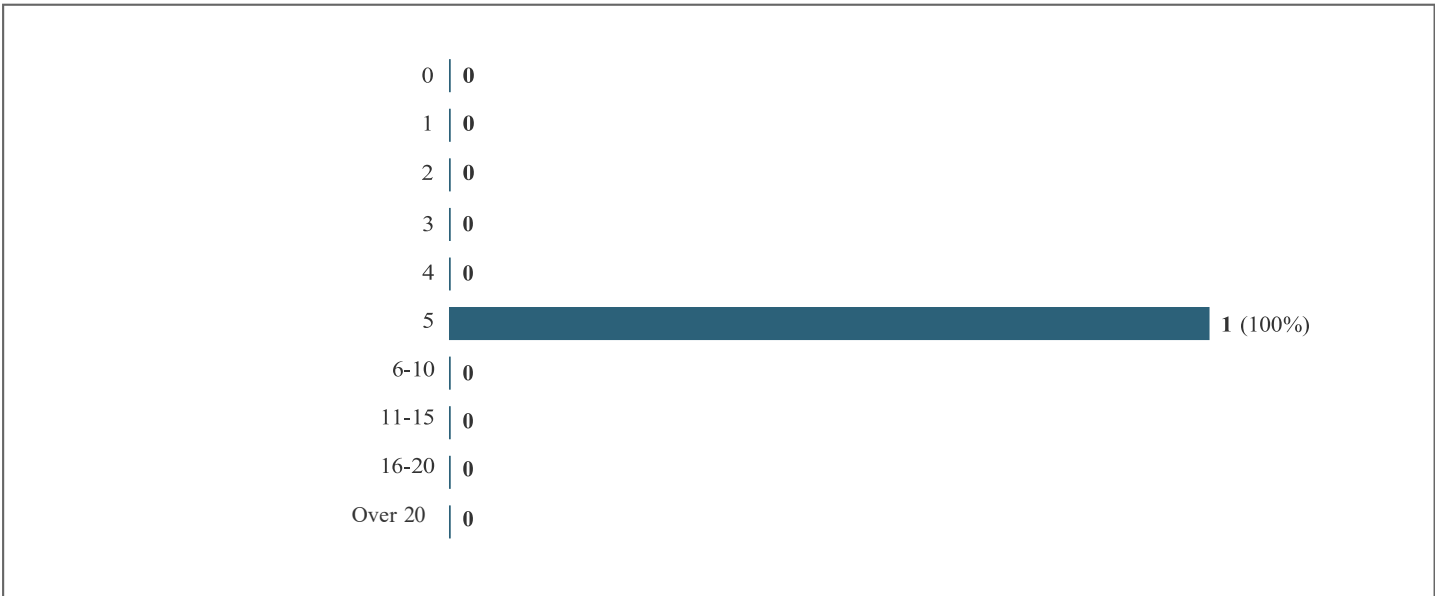
1		0	
2		0	
3		0	
4		0	
5		0	
6		0	
7		0	
8		0	
9		0	
10		0	
11		0	
12		0	
13		0	
14		0	
15			1 (100%)
16		0	
17		0	
18		0	
19		0	
20		0	
21		0	
22		0	
23		0	
24		0	
25		0	
26		0	
27		0	
28		0	
29		0	
30		0	
31		0	
32		0	
33		0	
34		0	
35		0	
36		0	
37		0	

38 | 0  
39 | 0  
40 | 0  
41 | 0  
42 | 0  
43 | 0  
44 | 0  
45 | 0  
46 | 0  
47 | 0  
48 | 0  
49 | 0  
50 | 0

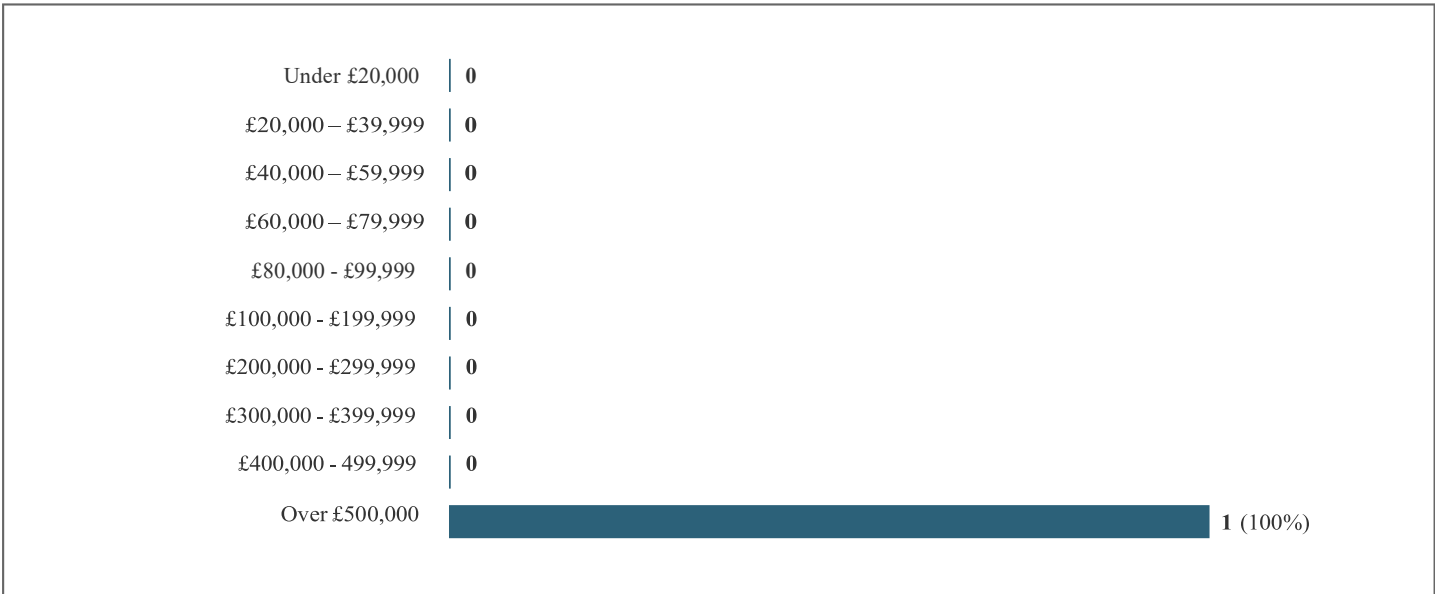
**76** How many full-time staff are employed at your company?



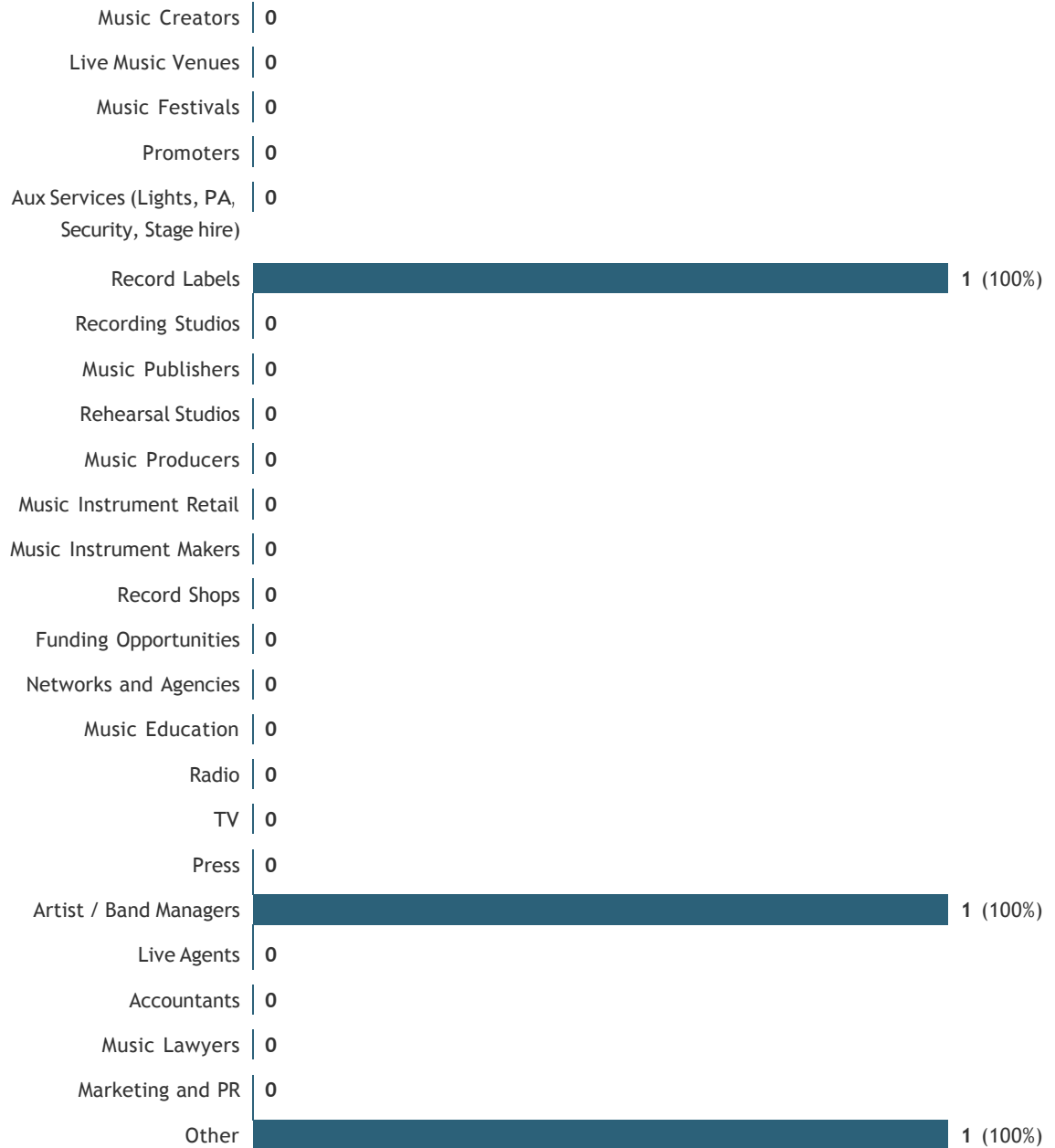
**77** How many part-time staff are employed at your company?



**78** What was your companies income for 2018?



**79** Which music industry stakeholders do you interact with? (please select all that apply)



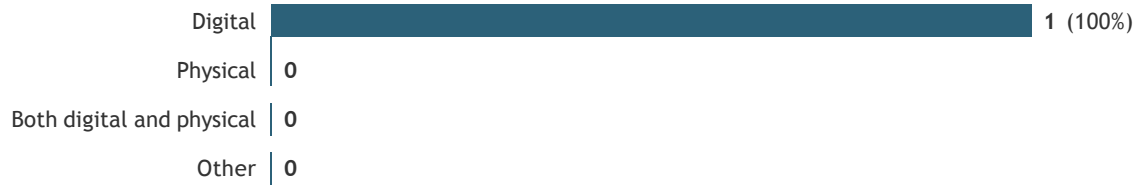
*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

79.a If you selected Other, please specify:

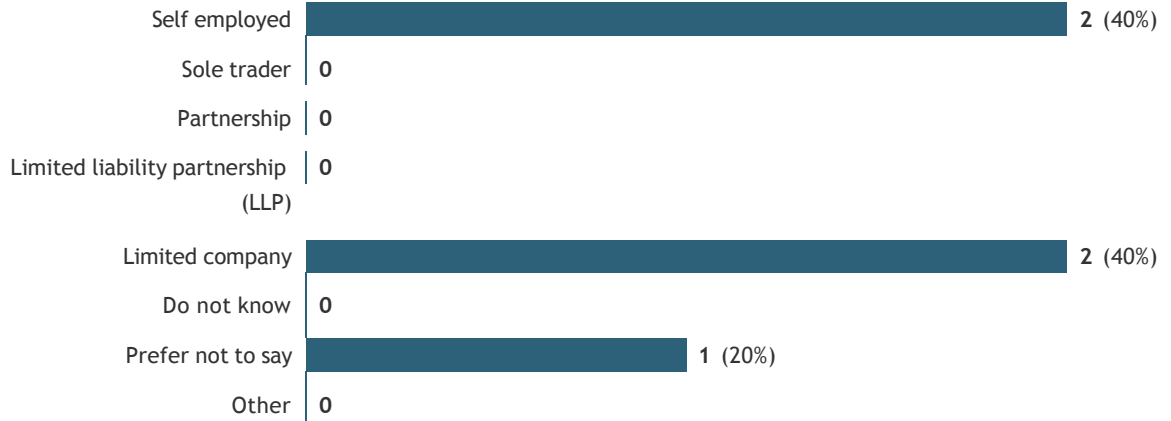
Showing 1 response

Digital Stores 741178-741169-81333926

80 What are your distribution methods?



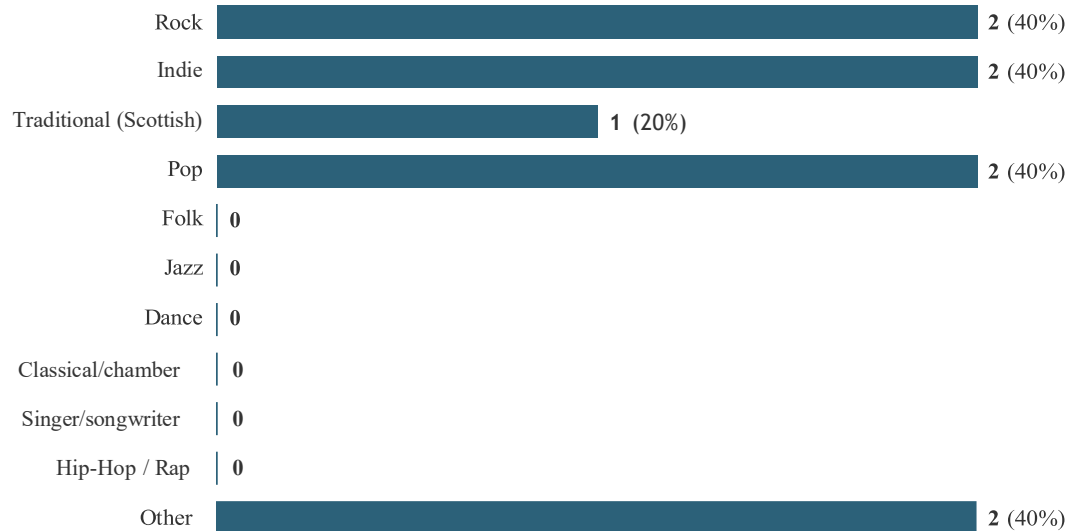
**81** What best describes your business setup?



**81.a** If you selected Other, please specify:

*No responses*

**82** What genres of music does your record label look after? (please select all that apply)

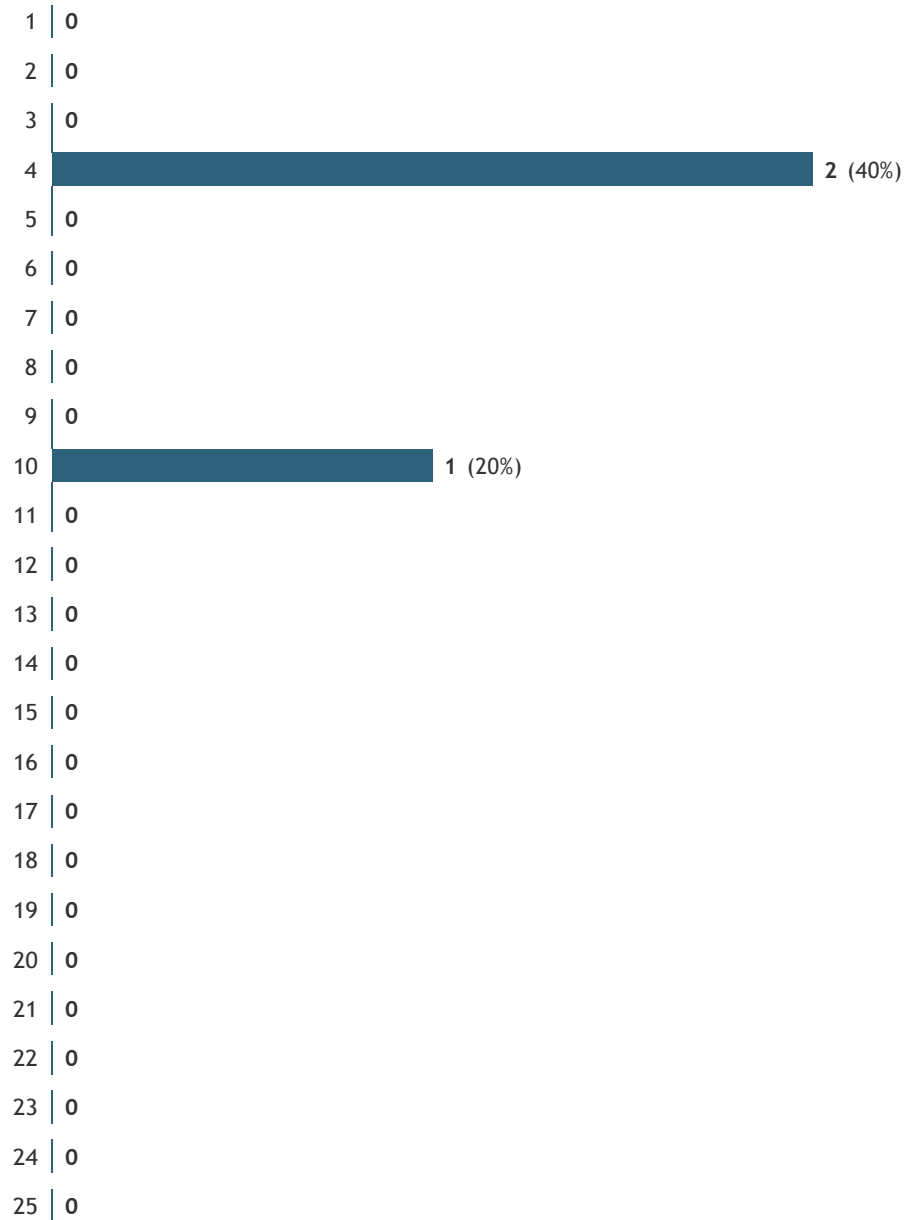


*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

82.a If you selected Other, please specify:

Showing all 2 responses	
Varies per release	741178-741169-81336183
multi-genre leftfield / dance / experimental	741178-741169-81349109

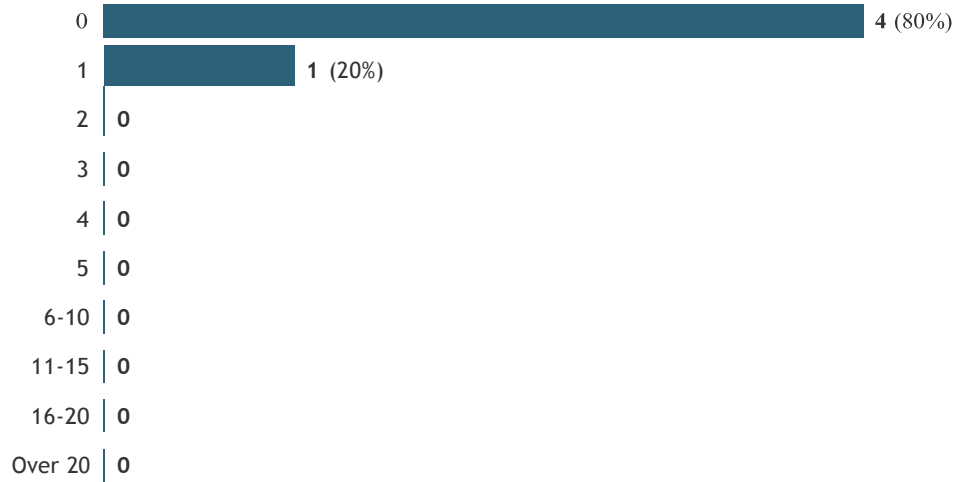
83 How many years has your business been trading?



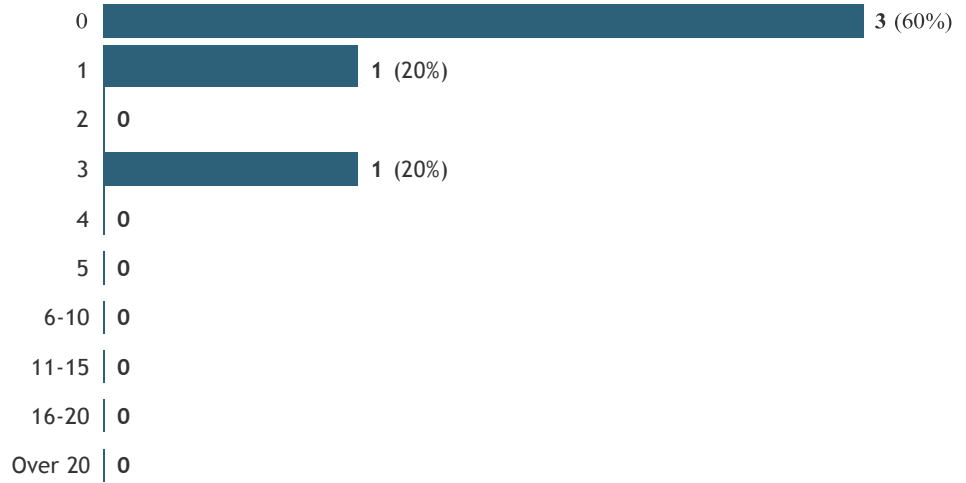
26		0	
27		0	
28		0	
29		0	
30		0	
31		0	
32		0	
33		0	
34		1	(20%)
35		1	(20%)
36		0	
37		0	
38		0	
39		0	
40		0	
41		0	
42		0	
43		0	
44		0	
45		0	
46		0	
47		0	
48		0	
49		0	
50		0	

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84 How many full-time staff are employed at your company?

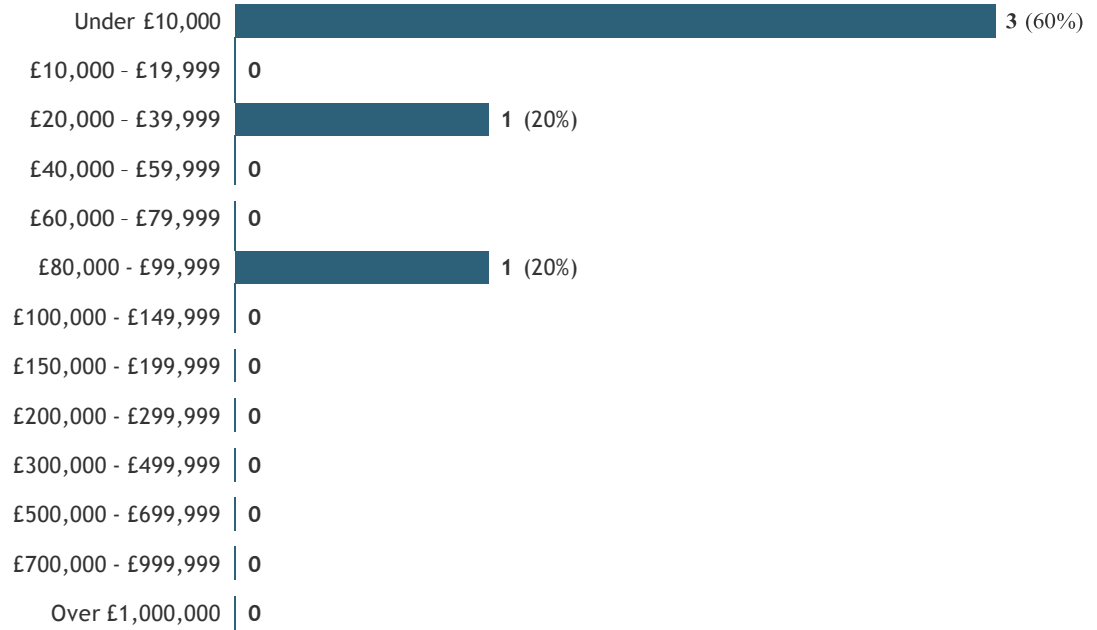


85 How many part-time staff are employed at your company?

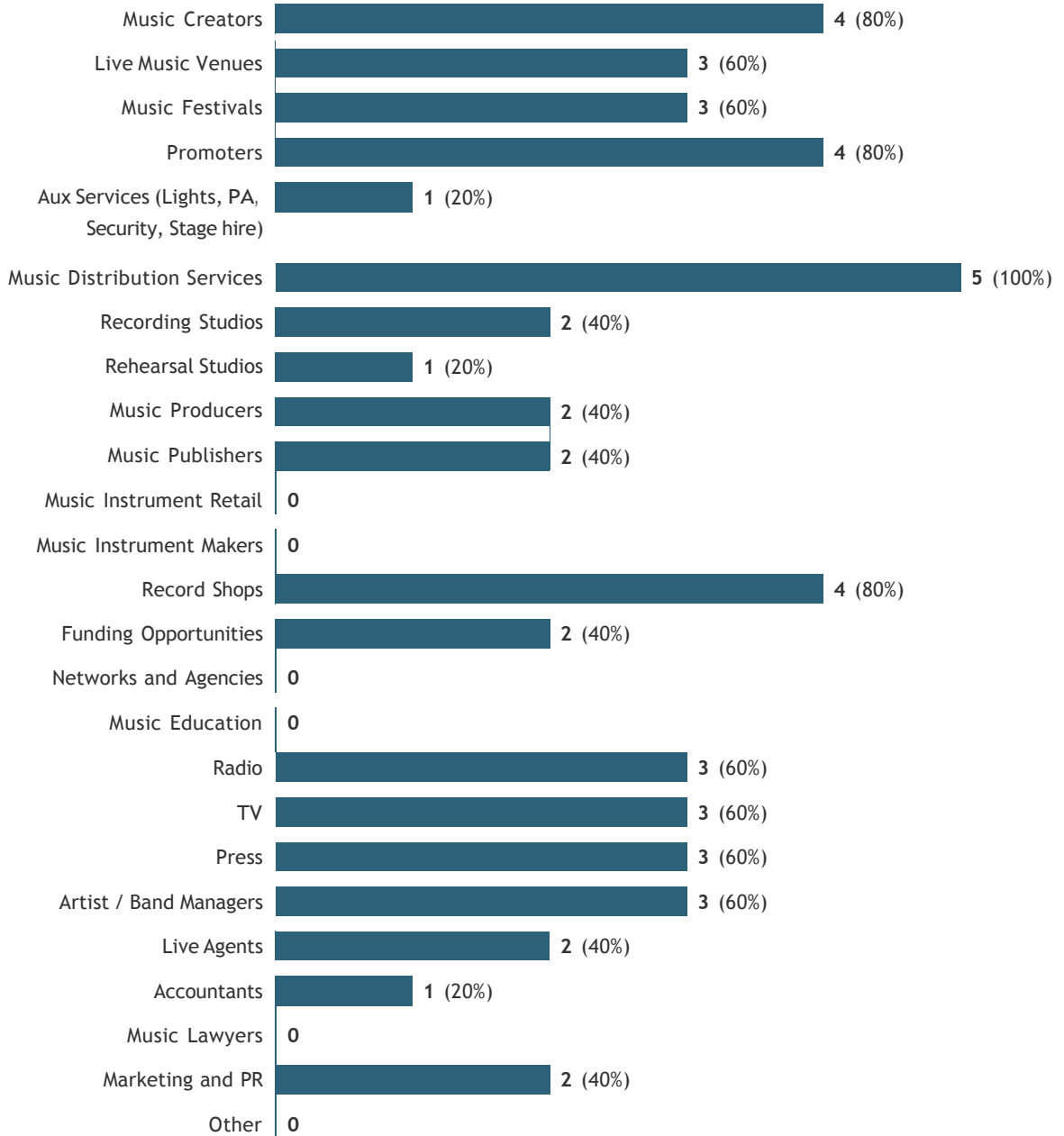


86 What was your companies income for 2018?





87 Which music industry stakeholders do you interact with? (please select all that apply)

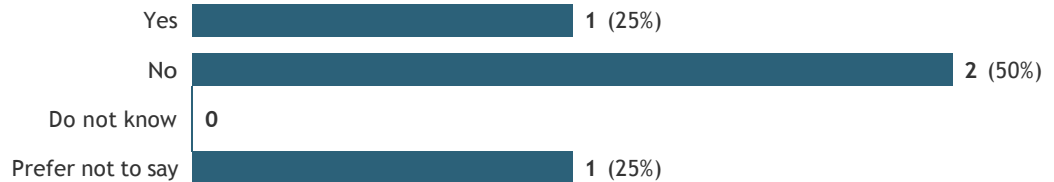


*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

87.a If you selected Other, please specify:

*No responses*

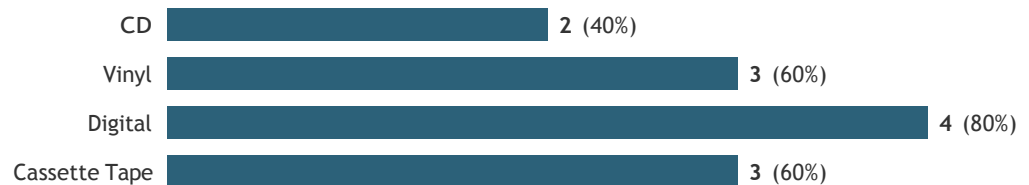
88 Are any of the acts on your label earning a livable wage from their music with no need for additional income?



89 Is your record label financially able to invest in new acts?

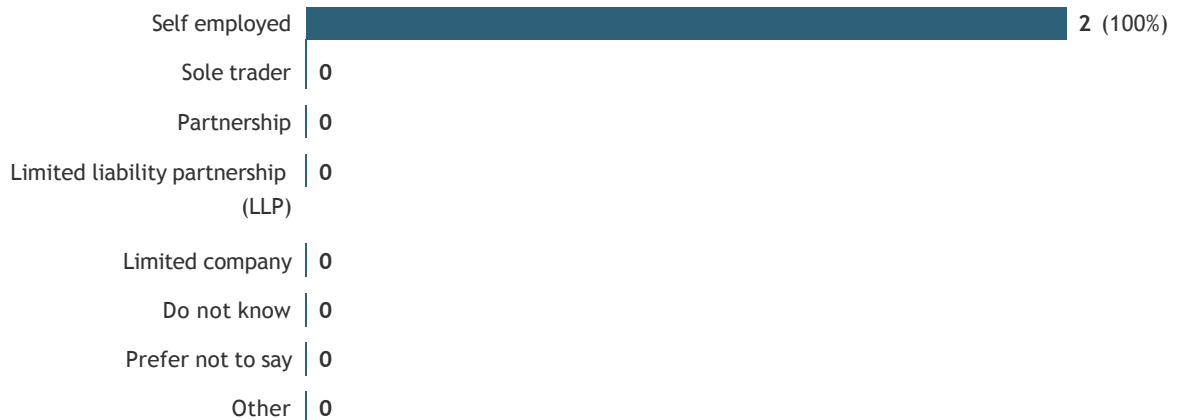


90 Which formats do you release music on? (please select all that apply)



*Multi answer. Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

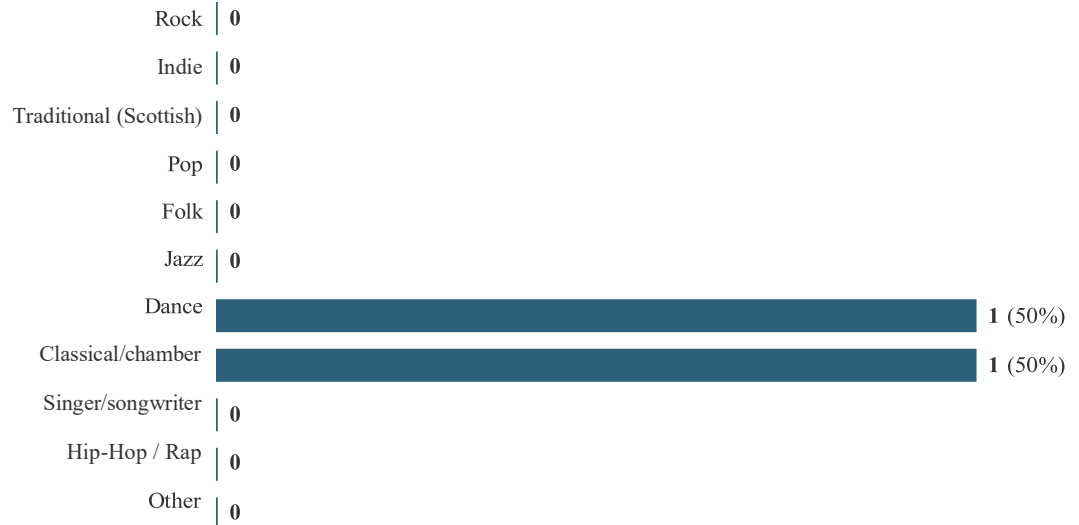
91 What best describes your business setup?



91.a If you selected Other, please specify:

No responses

92 What genres of music does your work encompass? (please select all that apply)



Multi answer. Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)

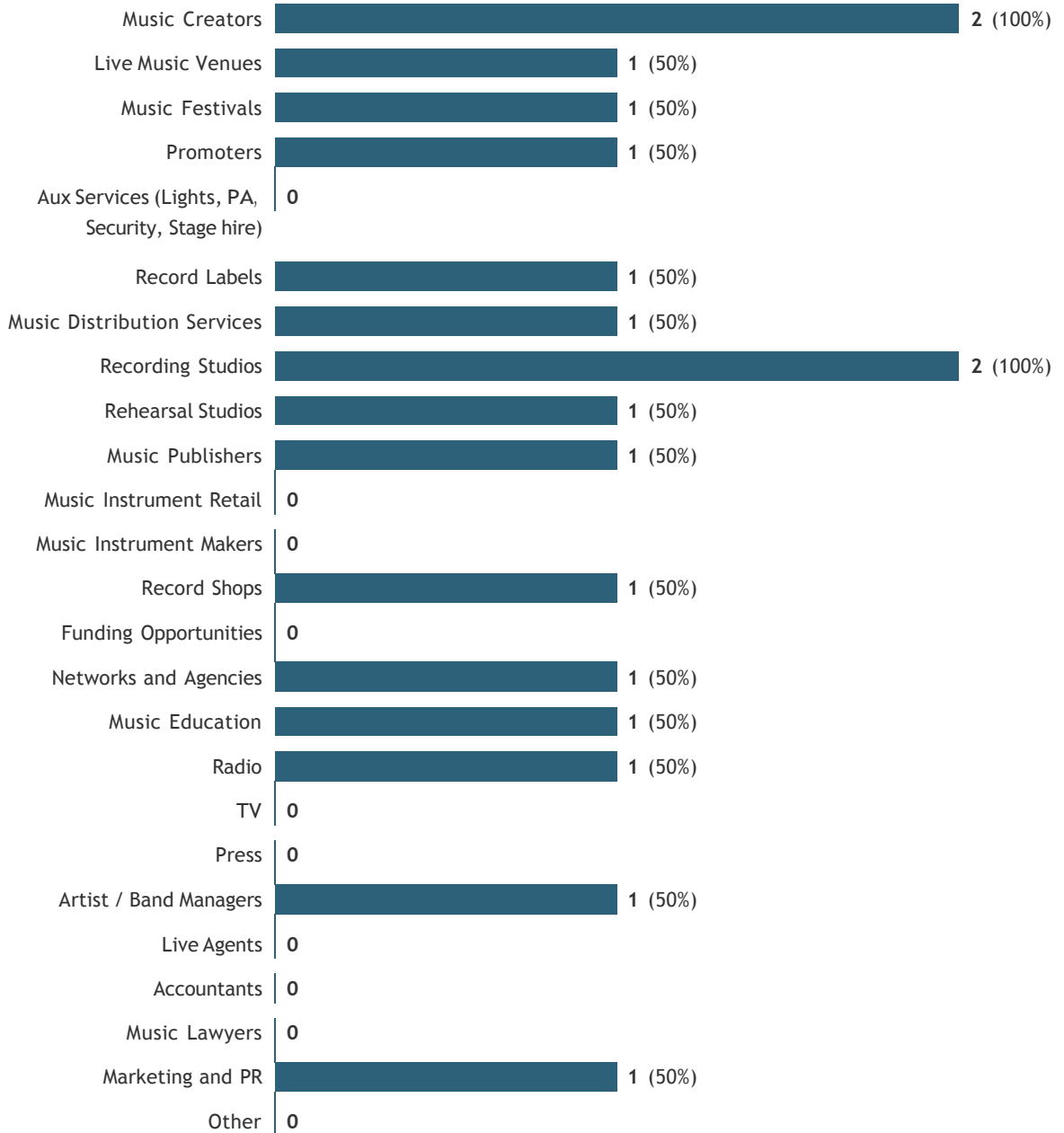
92.a If you selected Other, please specify:

No responses

93 What was your income for 2018?

Under £9,999	2 (100%)
£10,000 – £19,999	0
£20,000 – £29,999	0
£30,000 – £39,999	0
£40,000 – £49,999	0
£50,000 - £69,999	0
£70,000 – £79,999	0
£80,000 - £89,999	0
£90,000 - £99,999	0
Over £100,000	0

94 Which music industry stakeholders do you interact with? (please select all that apply)

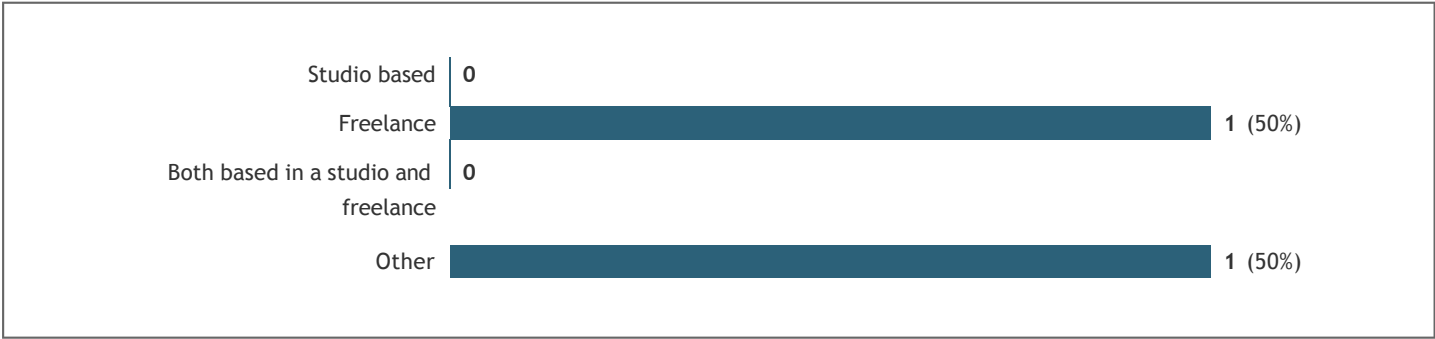


*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

94.a If you selected Other, please specify:

*No responses*

95 What is your employment status?

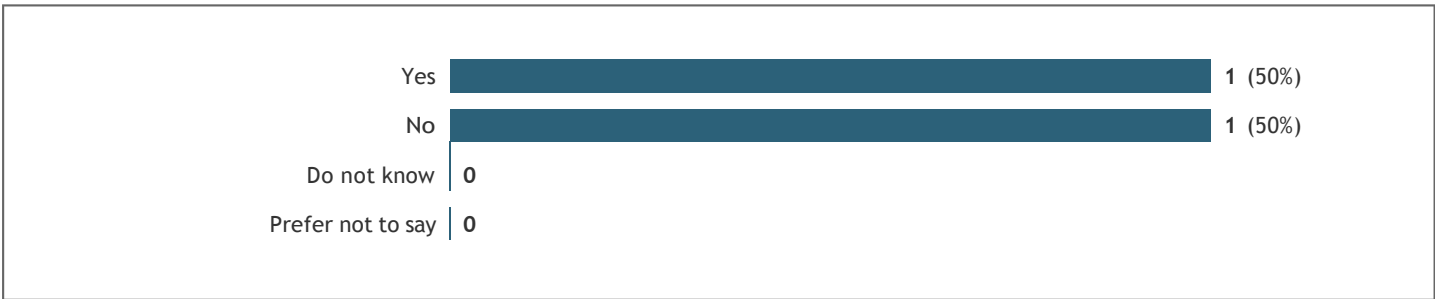


95.a If you selected Other, please specify:

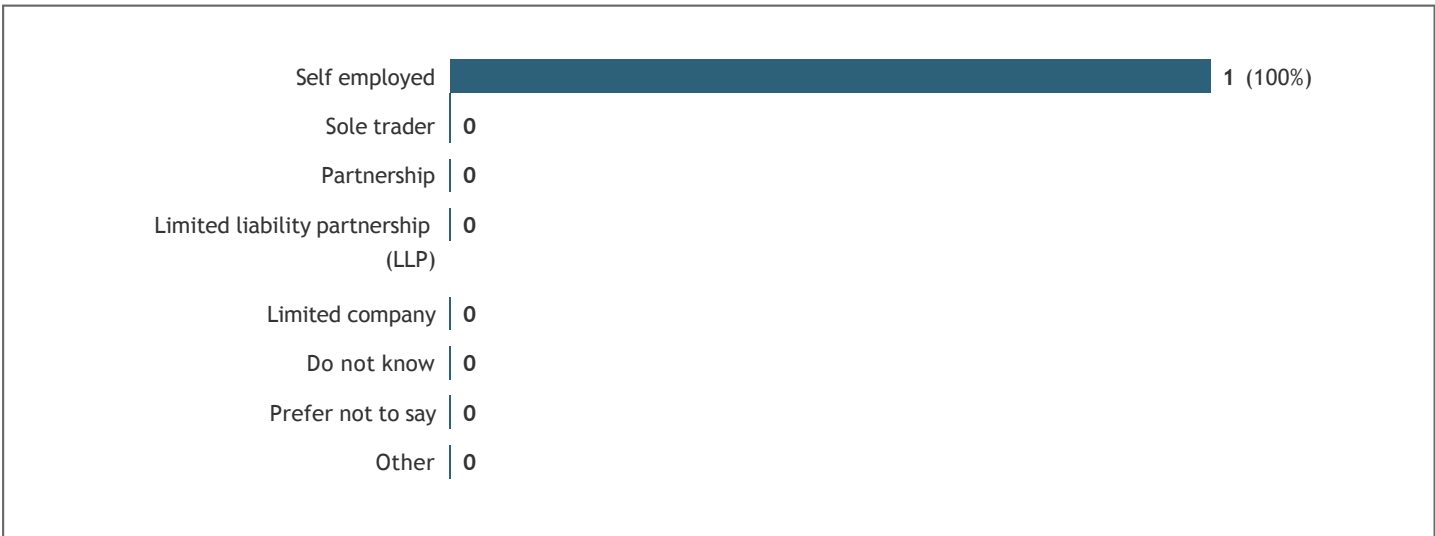
Showing 1 response

Full time non music work	741178-741169-81475736
--------------------------	------------------------

96 Do you work with artists from outwith Scotland?



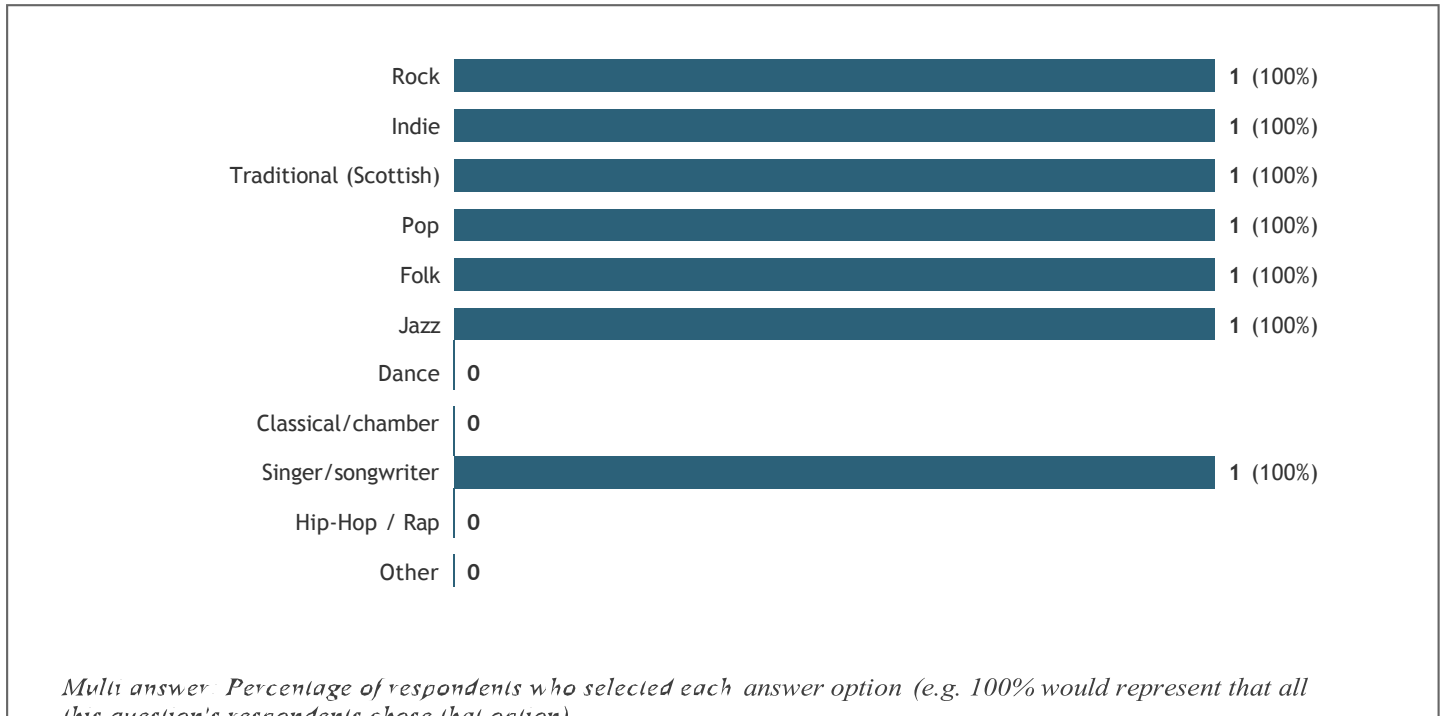
97 What best describes your business setup?



97.a If you selected Other, please specify:

No responses

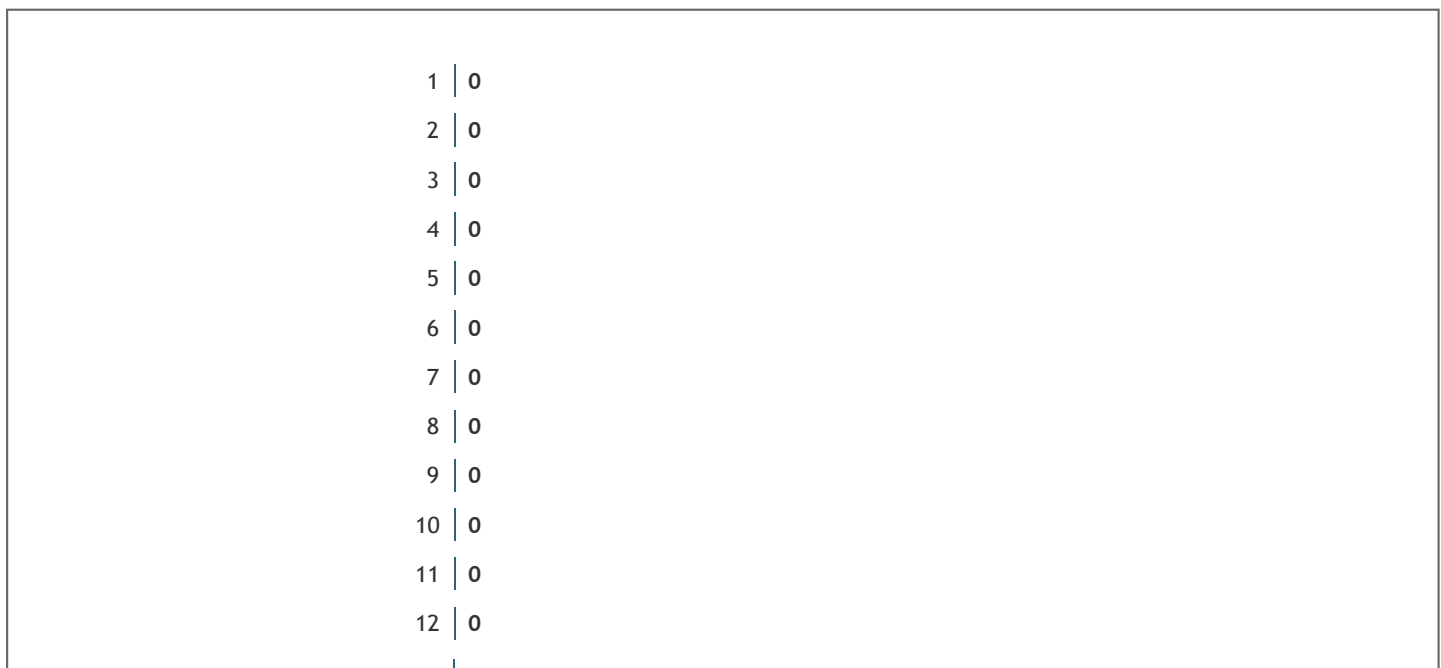
98 What genres of music does your work encompass? (please select all that apply)



98.a If you selected Other, please specify:

No responses

99 How many years has your business been trading?





13 | 0

14 |  1 (100%)

15 | 0

16 | 0

17 | 0

18 | 0

19 | 0

20 | 0

21 | 0

22 | 0

23 | 0

24 | 0

25 | 0

26 | 0

27 | 0

28 | 0

29 | 0

30 | 0

31 | 0

32 | 0

33 | 0

34 | 0

35 | 0

36 | 0

37 | 0

38 | 0

39 | 0

40 | 0

41 | 0

42 | 0

43 | 0

44 | 0

45 | 0

46 | 0

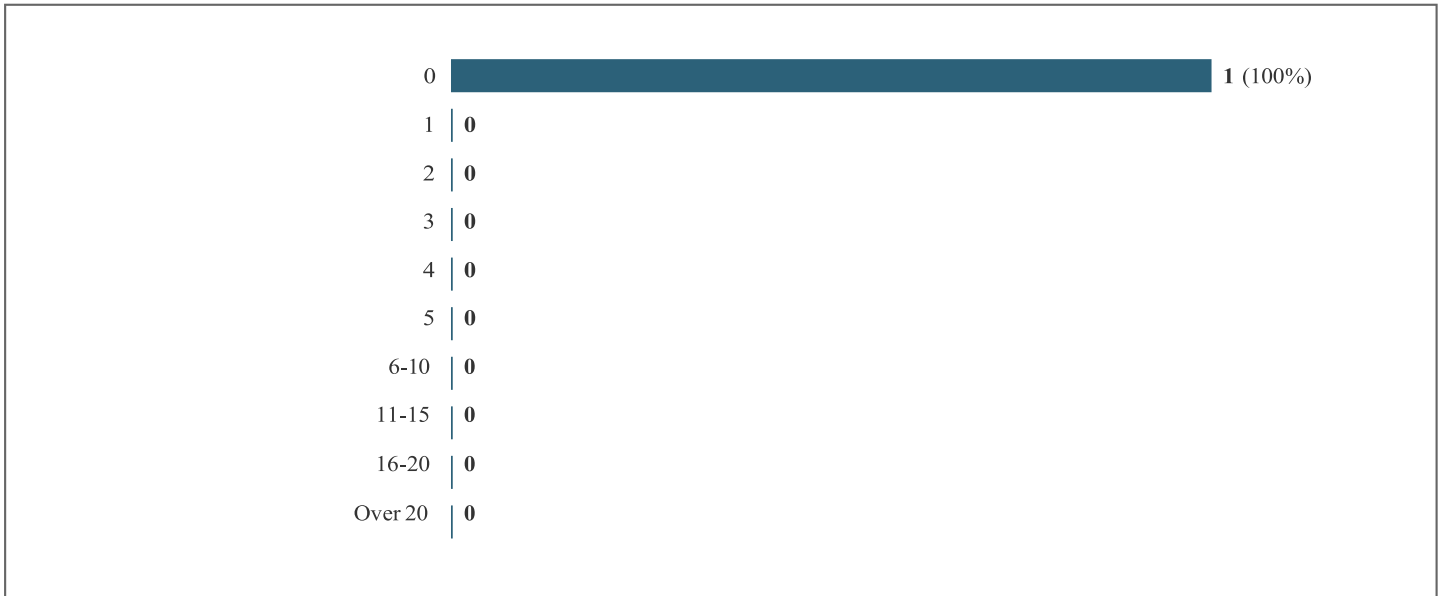
47 | 0

48 | 0

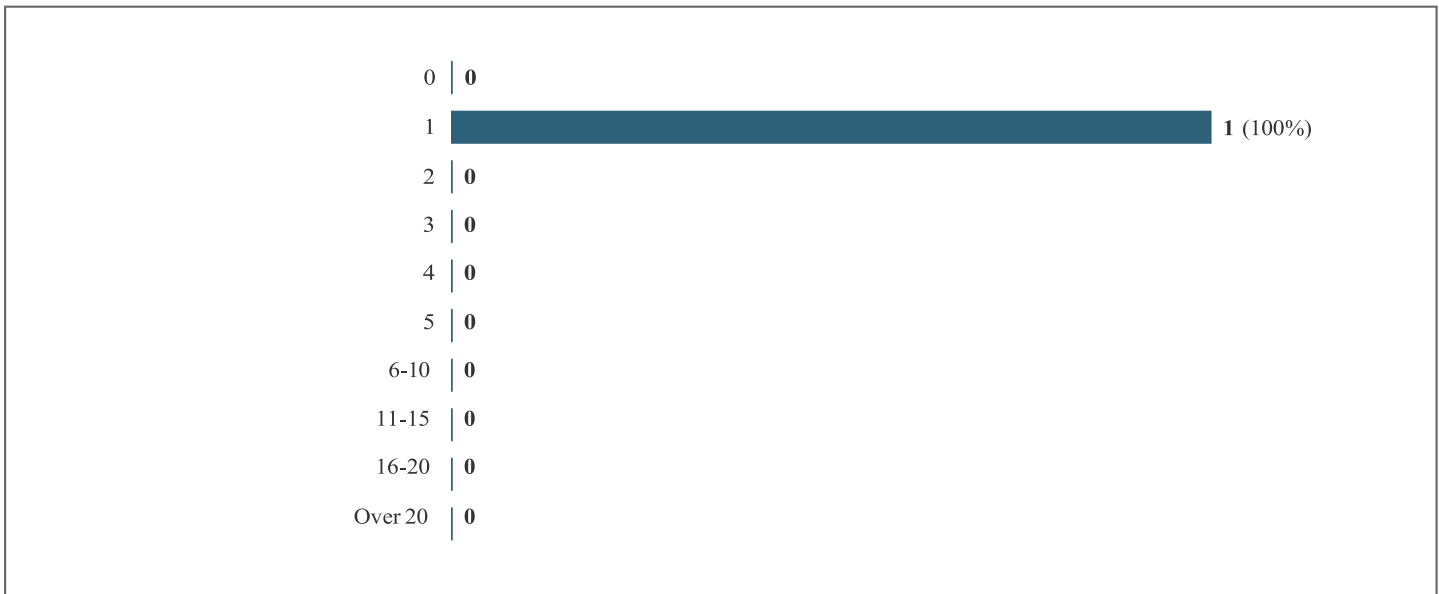
49 | 0

50 | 0

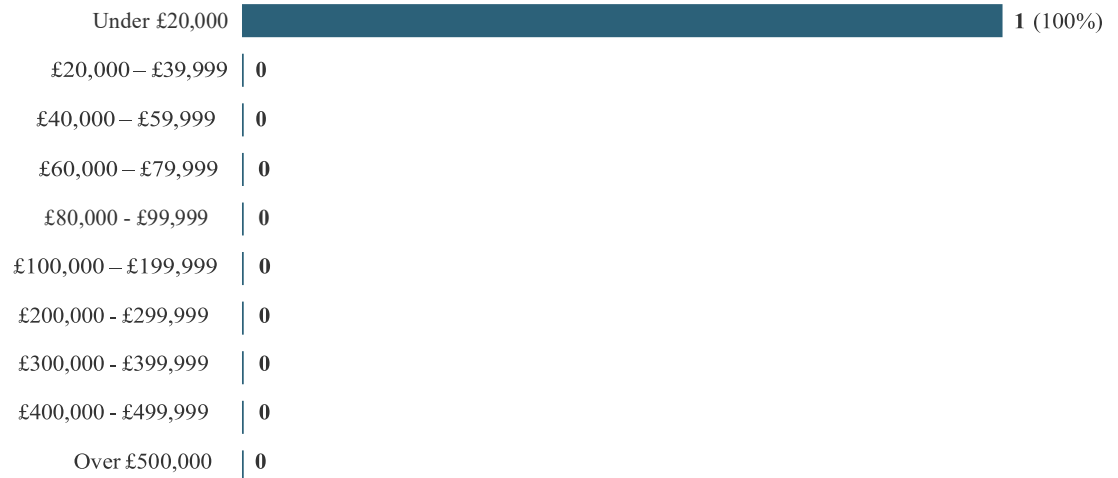
100 How many full-time staff are employed at your company?



101 How many part-time staff are employed at your company?



102 What was your companies income for 2018?



**103** How many hours a week is your studio active?



**103.a** If you selected Other, please specify:

*No responses*

**104** Has the introduction of home recording equipment had a negative impact on your companies income?

Yes	0
No	1 (100%)
Do not know	0
Prefer not to say	0

**105** Which music industry stakeholders do you interact with? (please select all that apply)

Music Creators	1 (100%)
Live Music Venues	0
Music Festivals	0
Promoters	0
Aux Services (Lights, PA, Security, Stage hire)	0
Record Labels	1 (100%)
Music Distribution Services	0
Rehearsal Studios	0
Music Producers	1 (100%)
Music Publishers	0
Music Instrument Retail	0
Music Instrument Makers	0
Record Shops	0
Funding Opportunities	1 (100%)
Networks and Agencies	1 (100%)
Music Education	1 (100%)
Radio	1 (100%)
TV	0
Press	0
Artist / Band Managers	1 (100%)
Live Agents	0
Accountants	0
Music Lawyers	0
Marketing and PR	0
Other	0

*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

105.a If you selected Other, please specify:

No responses

106 Is your recording studio used for purposes other than recording music?



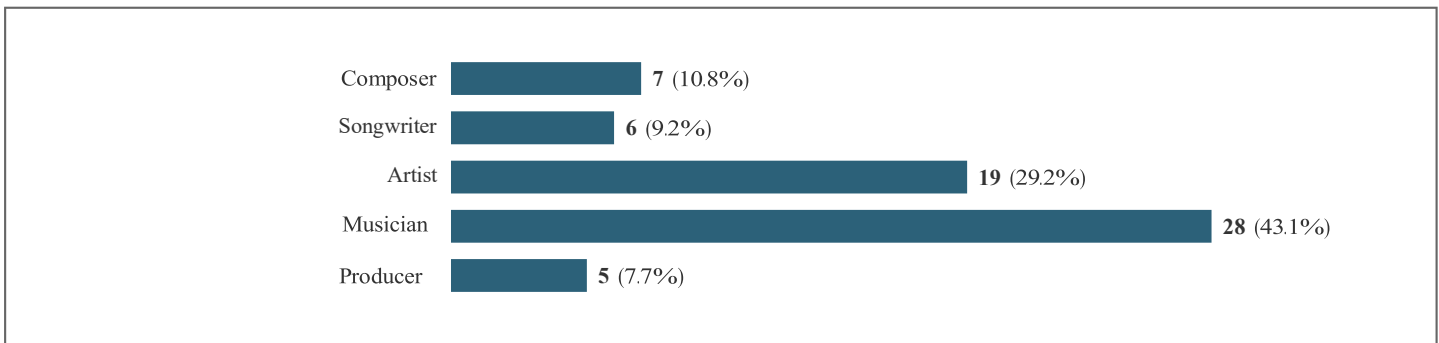
106.a If you selected Yes, please specify what other purposes.

Showing 1 response	
Podcasts	741178-741169-81400124

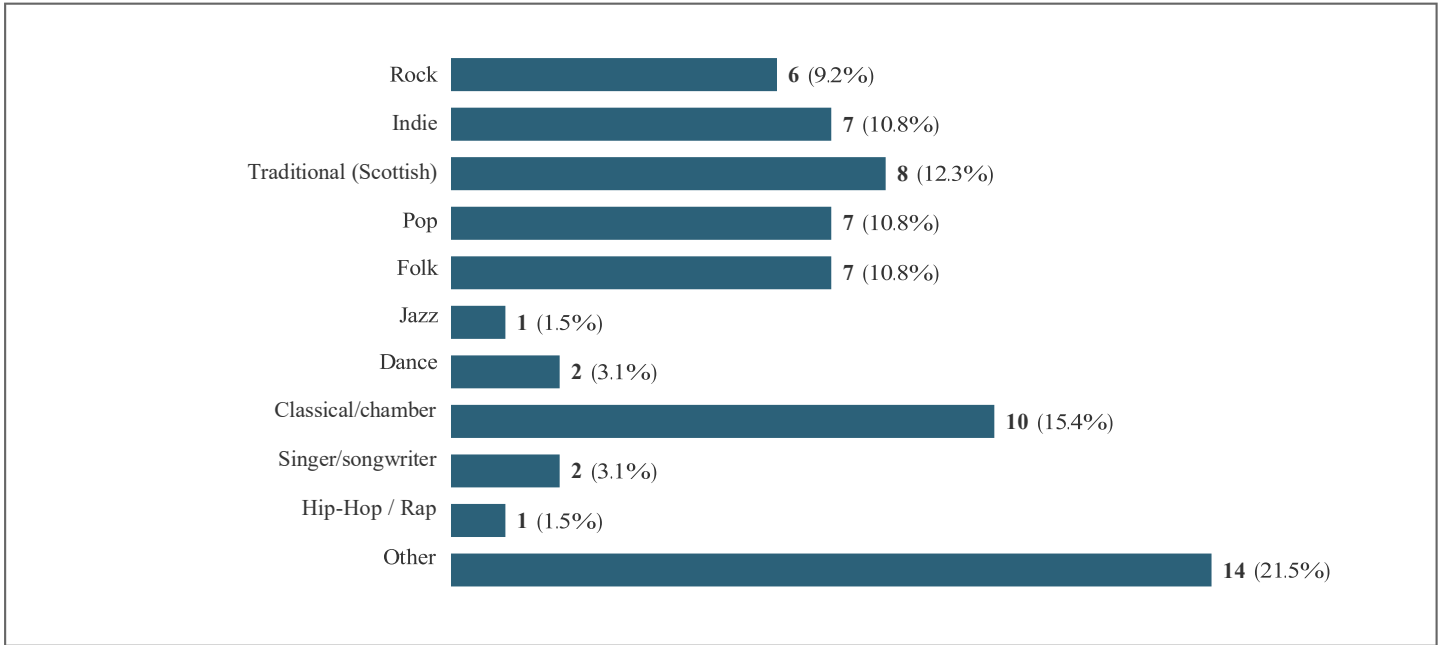
107 What percentage of studio bookings are from Scottish based acts?



108 Which type of music creator are you??



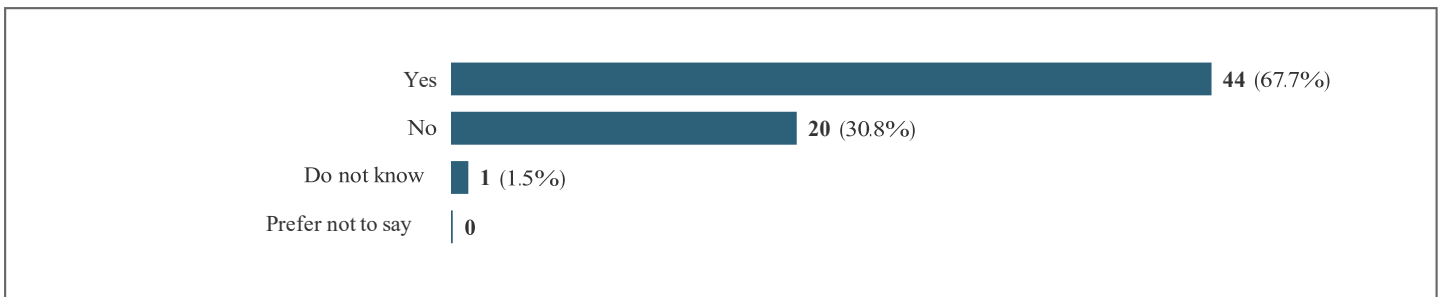
**109** Which genre of music do you primarily identify with?



**109.a** If you selected Other, please specify:

Showing first 5 of 14 responses	
mix of various genres mentioned above	<a href="#">741178-741169-81336762</a>
Acousmatic. Electro acoustic.	<a href="#">741178-741169-81342364</a>
Experimental	<a href="#">741178-741169-81342555</a>
Electronic	<a href="#">741178-741169-81347817</a>
Jungle, drum and bass	<a href="#">741178-741169-81349146</a>

**110** Did you receive any music tuition whilst at school?



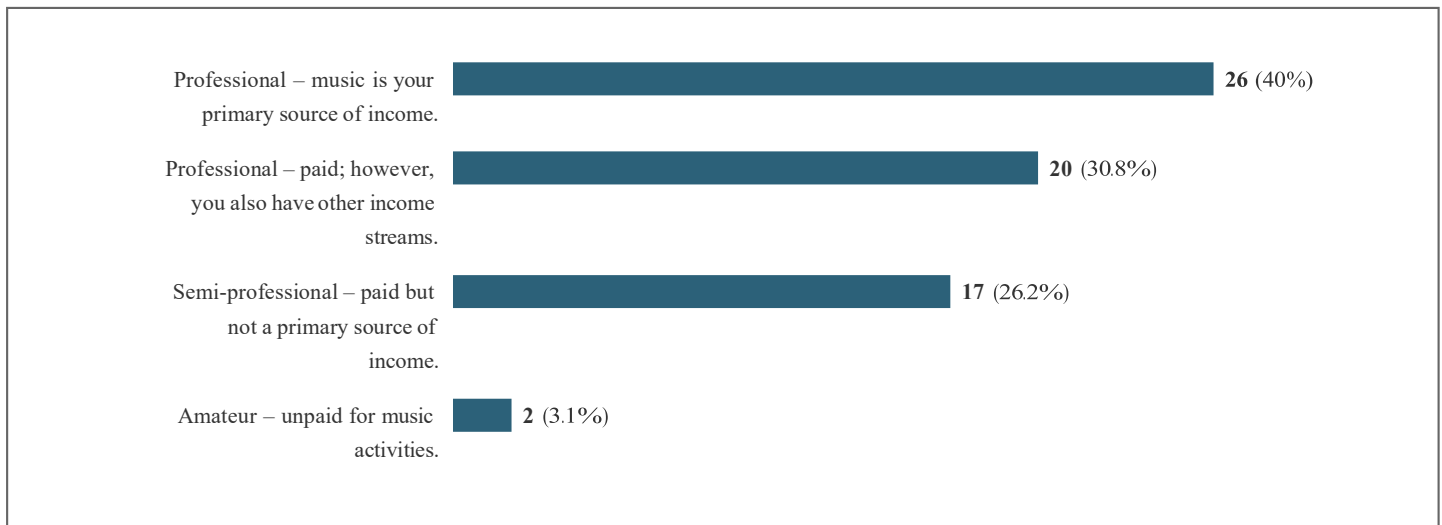
**110.a** If you selected Yes, please specify how this was funded, publicly or privately:

Showing first 5 of 44 responses	
Part public, part private	741178-741169-81334053
class music. everyone got it	741178-741169-81335199
a mix of parents and school	741178-741169-81335806
Publicly	741178-741169-81335192
it was part of the school curriculum for everyone, from class 1 up (age 6). The school was a charity so funded by charitable donations and fundraising.	741178-741169-81336762

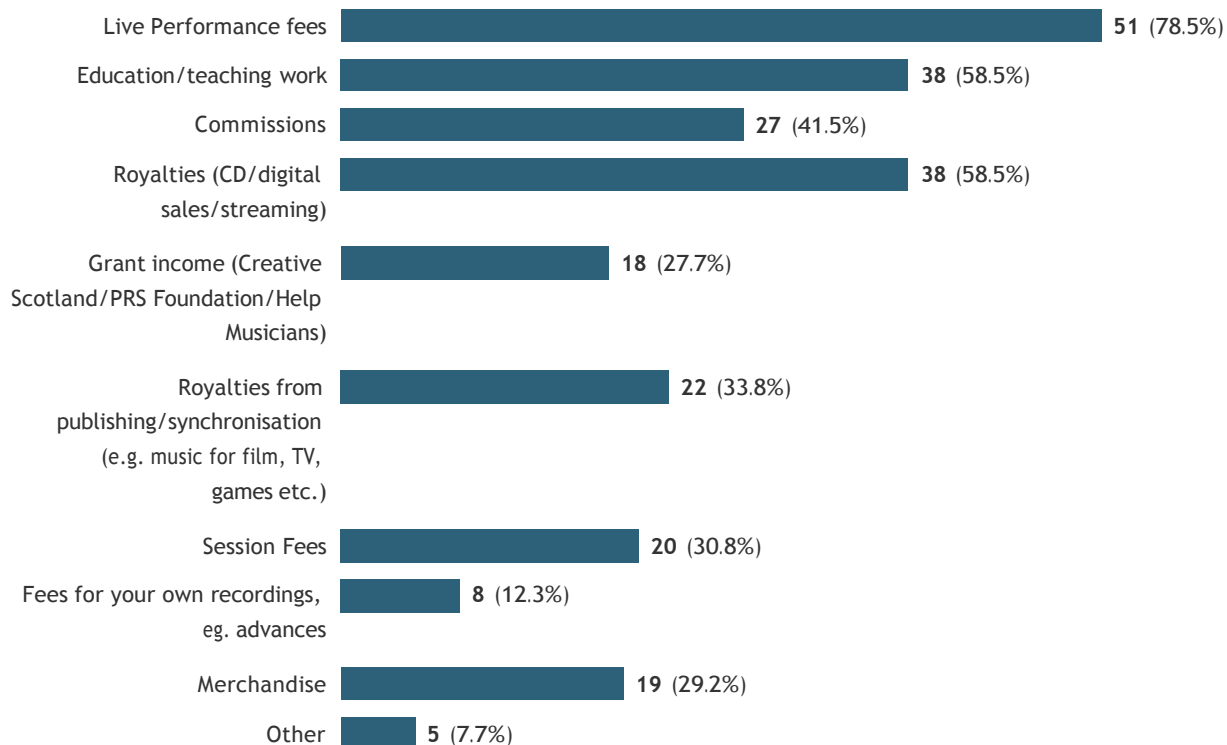
**111** How many hours a week do you spend working on music?



**112** How would you define yourself as a music creator?



**113** Which of these sources make up your musical income? (please select all that apply)

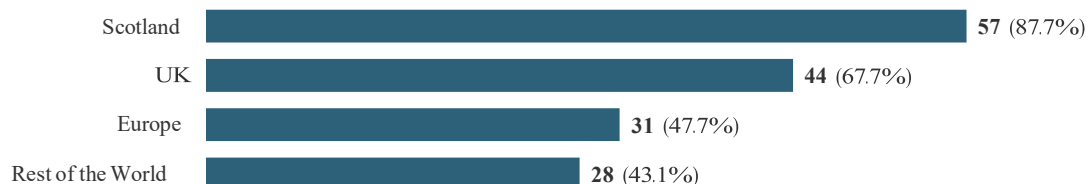


*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all*

113.a If you selected Other, please specify:

Showing all 4 responses	
Song royalty registration	741178-741169-81335192
Freelance Production & Mix/Mastering Services. Djing	741178-741169-81483771
Gear demos and youtube	741178-741169-81545273
No money	741178-741169-81648389

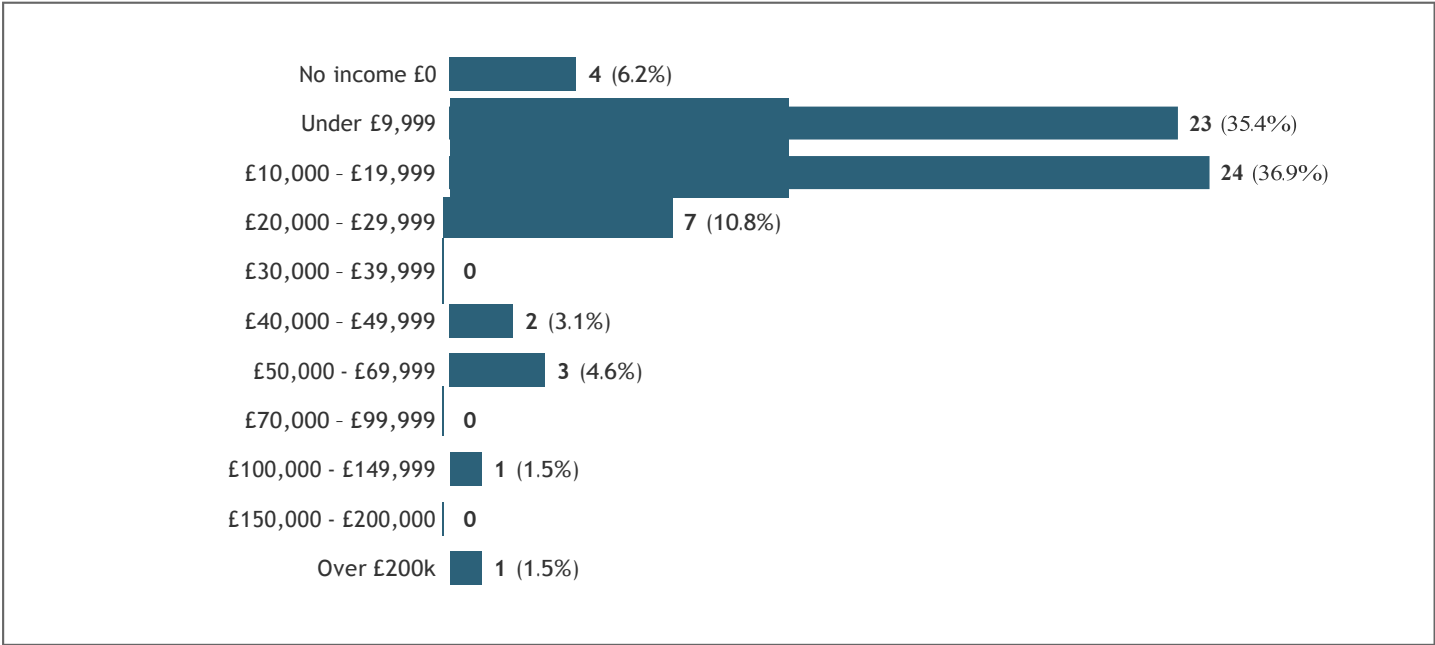
114 Where does your income generate? (please select all that apply)



*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*



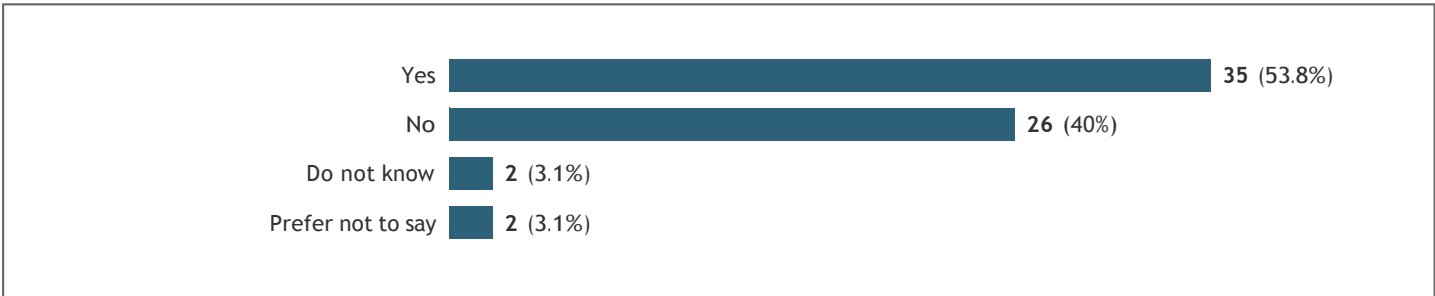
**115** What was your income for music-related activities in 2018



**116** Considering the income you earn from all your occupations (music industry or otherwise), what best describes your current financial situation?



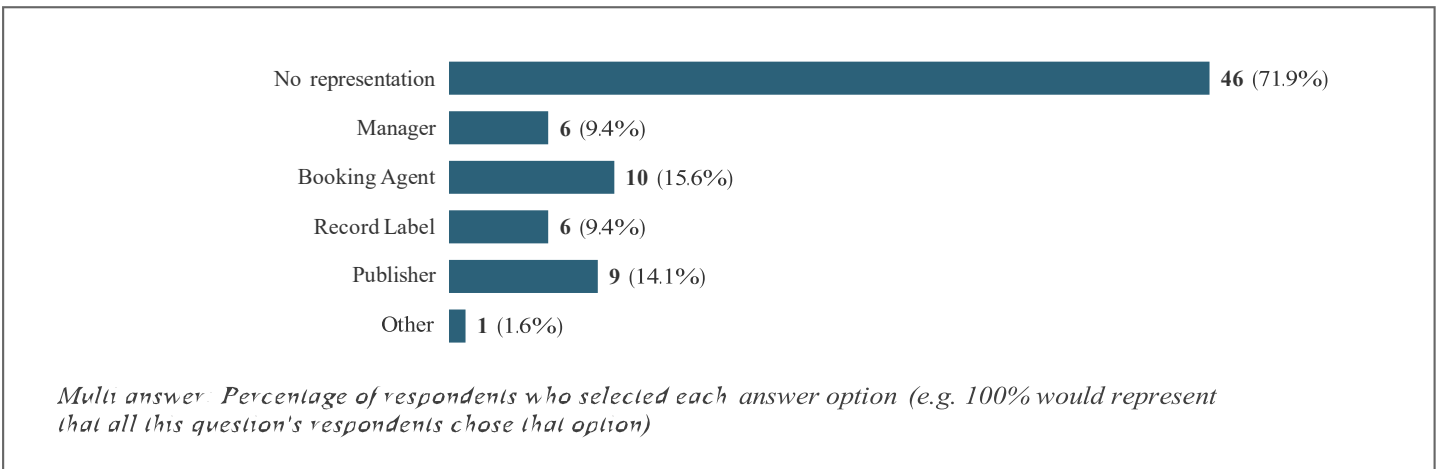
**117** Have you ever received funding for your music activities, either private or public?



117.a If yes, who was the funder?

Showing first 5 of 32 responses	
Both privately and charity	741178-741169-81334053
Creative Scotland, PRS, Hope Scott Trust, RVW Trust, NI Arts Council, Help Musicians, Bliss Trust	741178-741169-81335806
Tasgadh (CS)	741178-741169-81342555
National Lottery, Big Music Project	741178-741169-81343388
Nevis Ensemble	741178-741169-81347817

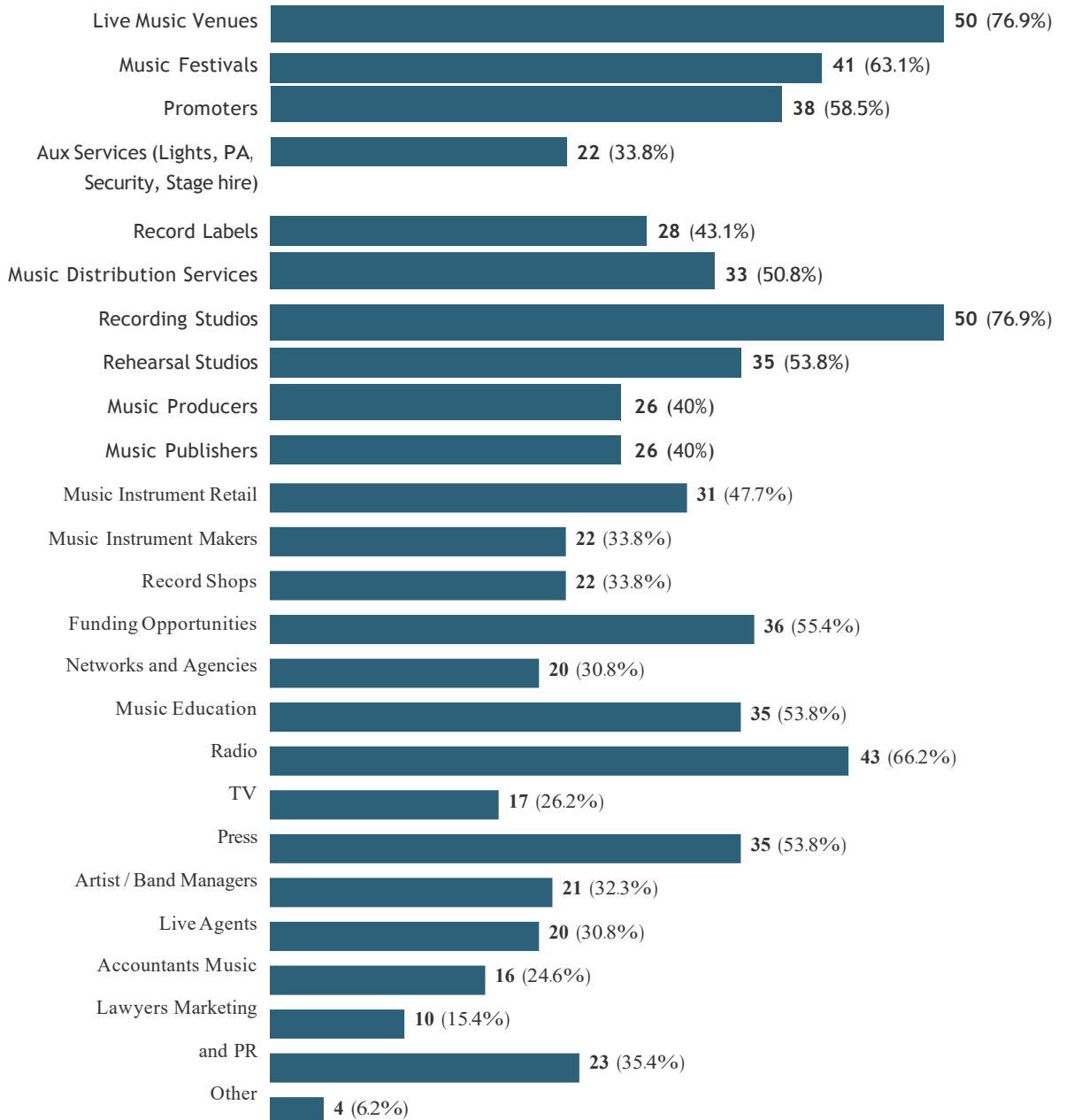
118 Do you have anyone representing you? (please select all that apply)



118.a If you selected Other, please specify:

Showing 1 response	
I am an employee of other companies	741178-741169-81335192

119 Which music industry stakeholders do you interact with? (please select all that apply)

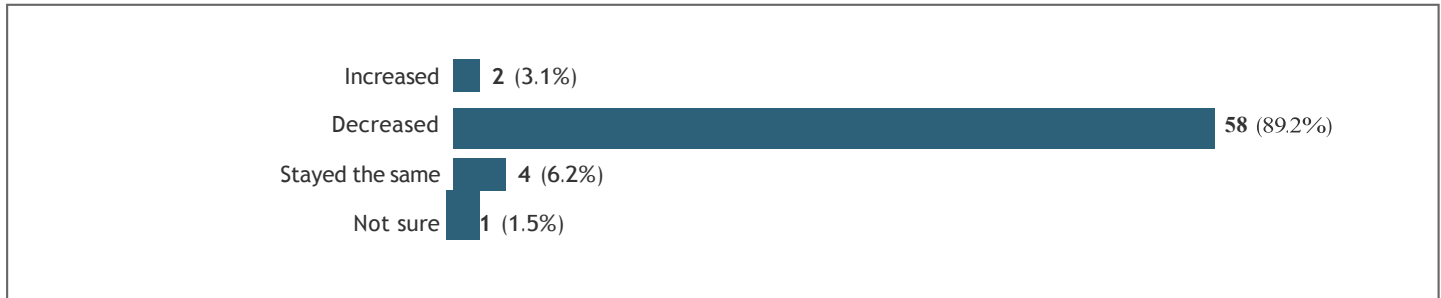


*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

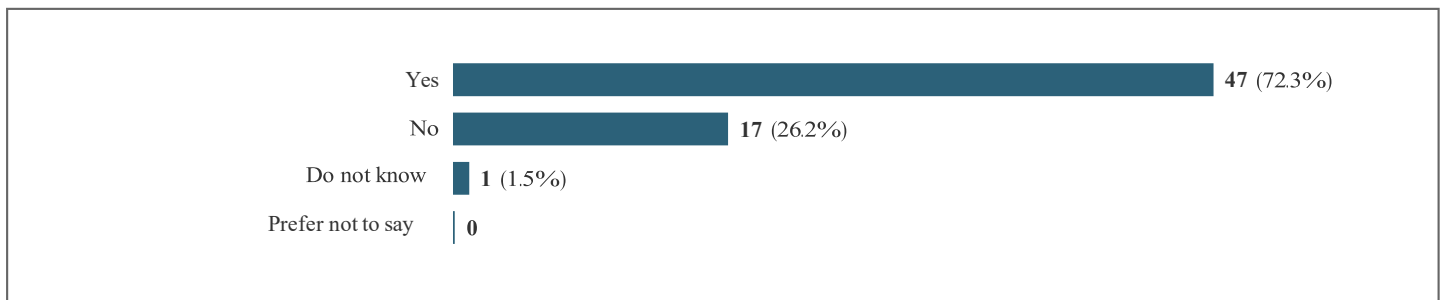
119.a If you selected Other, please specify:

Showing all 4 responses	
Performers	741178-741169-81335806
Musicians' Umion	741178-741169-81353230
Orchestras	741178-741169-81385050
Other artists	741178-741169-81607769

120 Since the pandemic began, has your income from music activities...



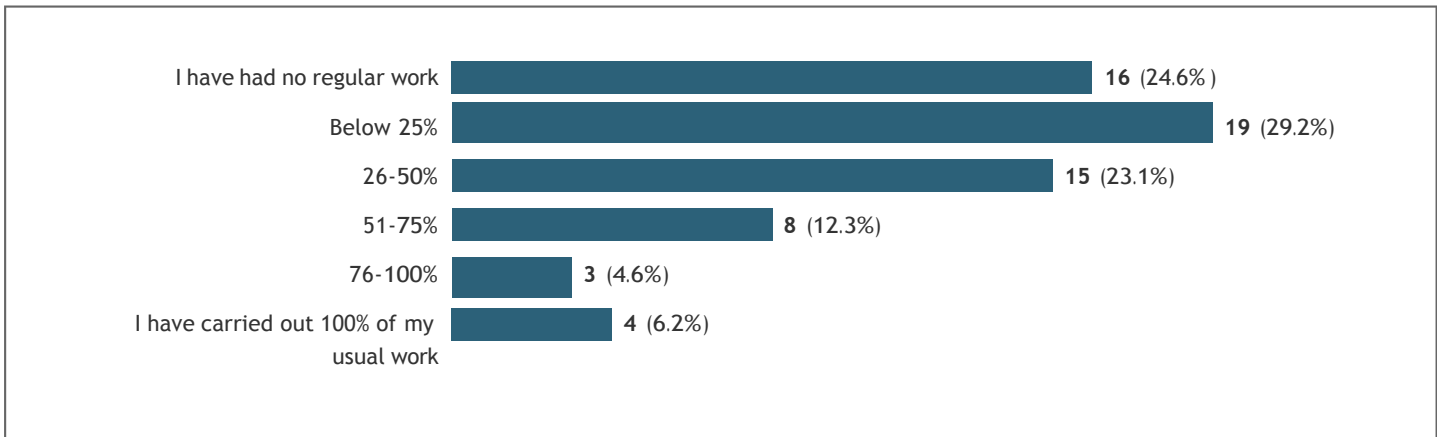
121 Has Covid-19 impacted your ability to create music?



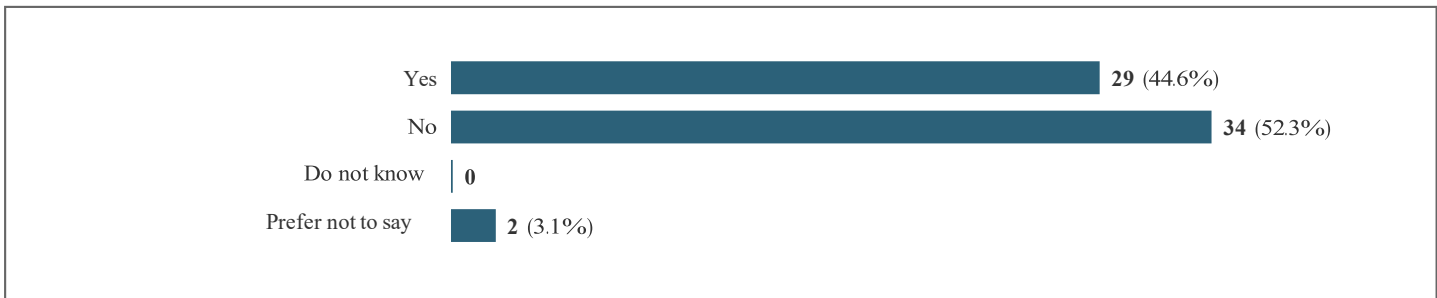
121.a If you selected Yes, please specify the reasons.

Showing first 5 of 47 responses	
Now all teaching, few live gigs	741178-741169-81334053
More recordings made	741178-741169-81335199
Cannot put on concerts, performers aren't commissioning as much	741178-741169-81335806
I could not create music with other players for 18 months.	741178-741169-81335192
Money is non existant, I have had to take up other studies and work to get by. It has affected my confidence, mental health and ability to enjoy and make music	741178-741169-81336023

**122** What percentage of your usual work have you been able to carry out since the pandemic began?



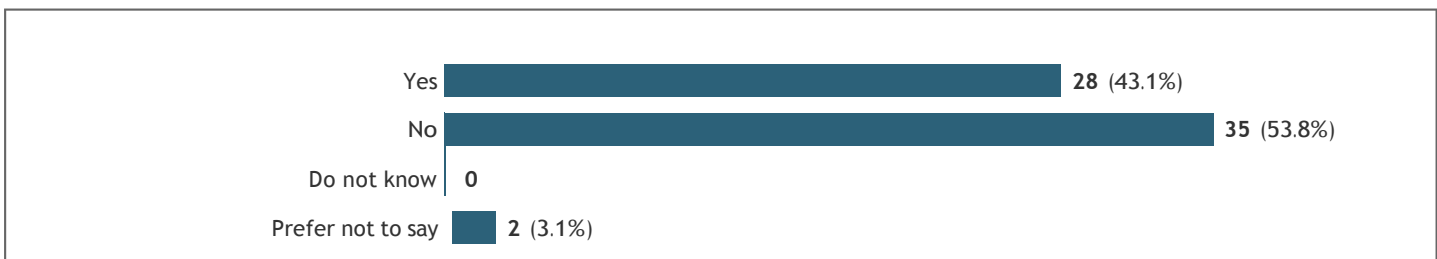
**123** Have you applied for Covid relief funds?



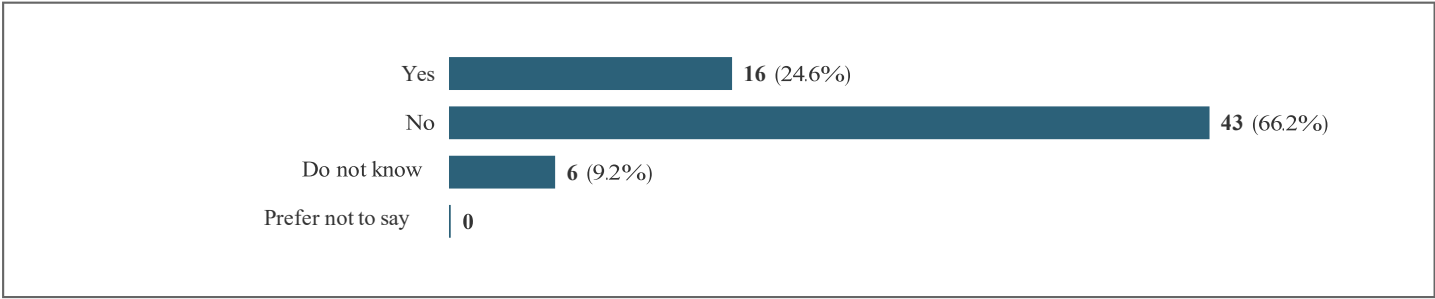
**123.a** If you selected yes, please specify whether you were successful with your application.

Showing first 5 of 29 responses	
successful	<a href="#">741178-741169-81334053</a>
SEISS for self employed	<a href="#">741178-741169-81335199</a>
successful	<a href="#">741178-741169-81335806</a>
Yes	<a href="#">741178-741169-81335192</a>
HELP FOR MUSICIANS FUNDING	<a href="#">741178-741169-81346762</a>

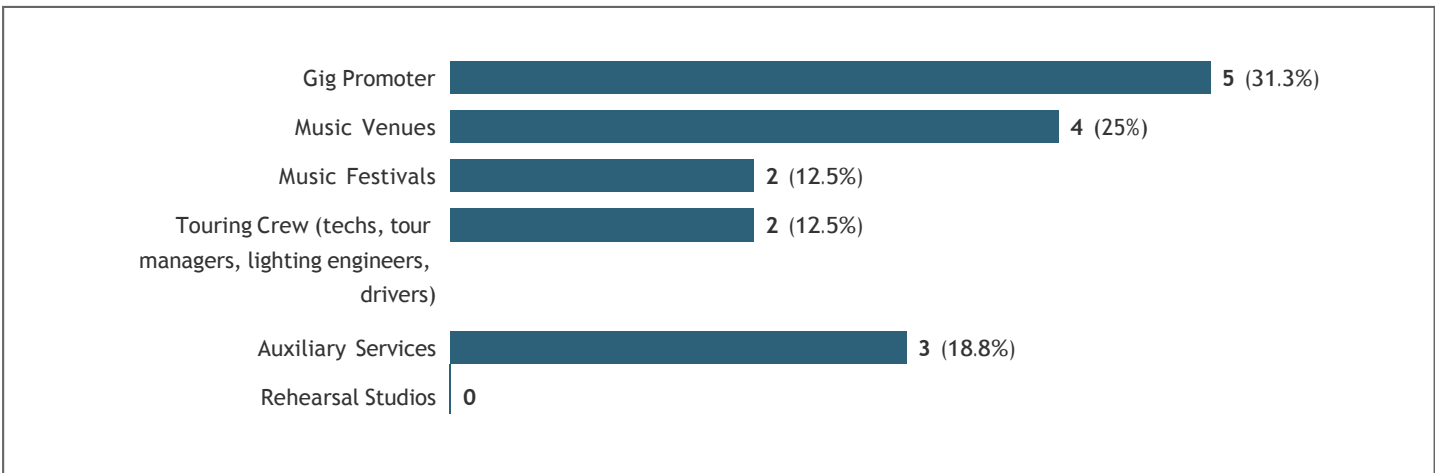
**124** Have you taken on work outside the music industries during the pandemic?



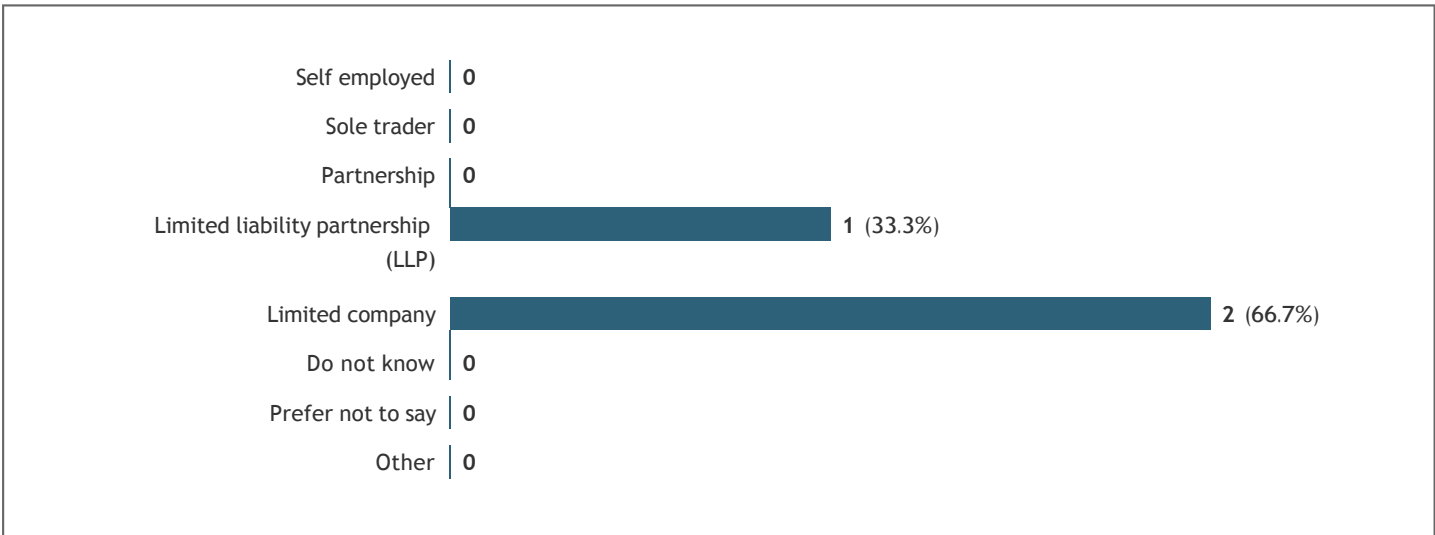
**125** Have you considered leaving the music industries as a result of the pandemic restrictions?



**126** Please select your area of work



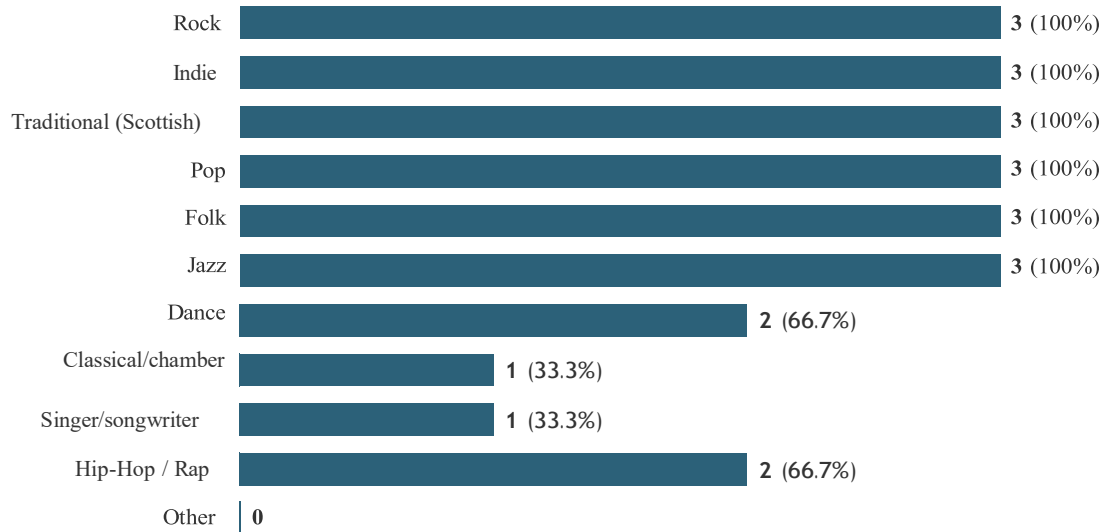
**127** What best describes your business setup?



127.a If you selected Other, please specify:

No responses

128 What genres of music does your work encompass? (please select all that apply)



Multi answer. Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)

128.a If you selected Other, please specify:

No responses

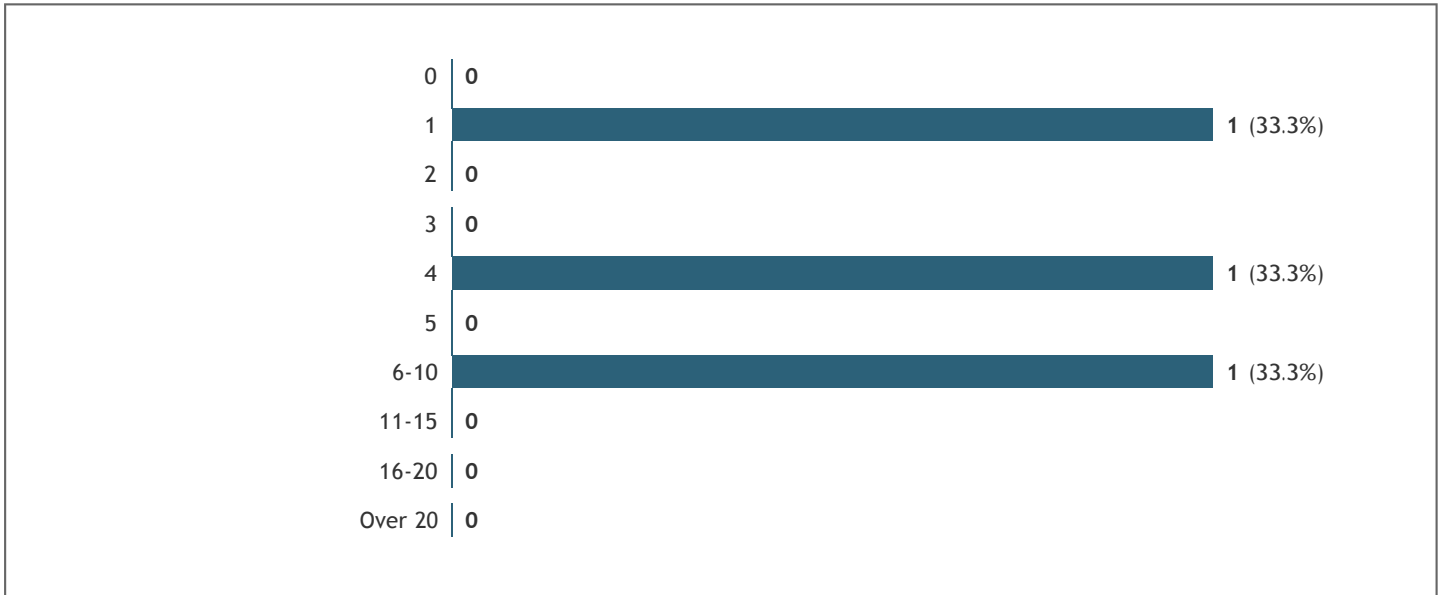
129 How many years has your business been trading?



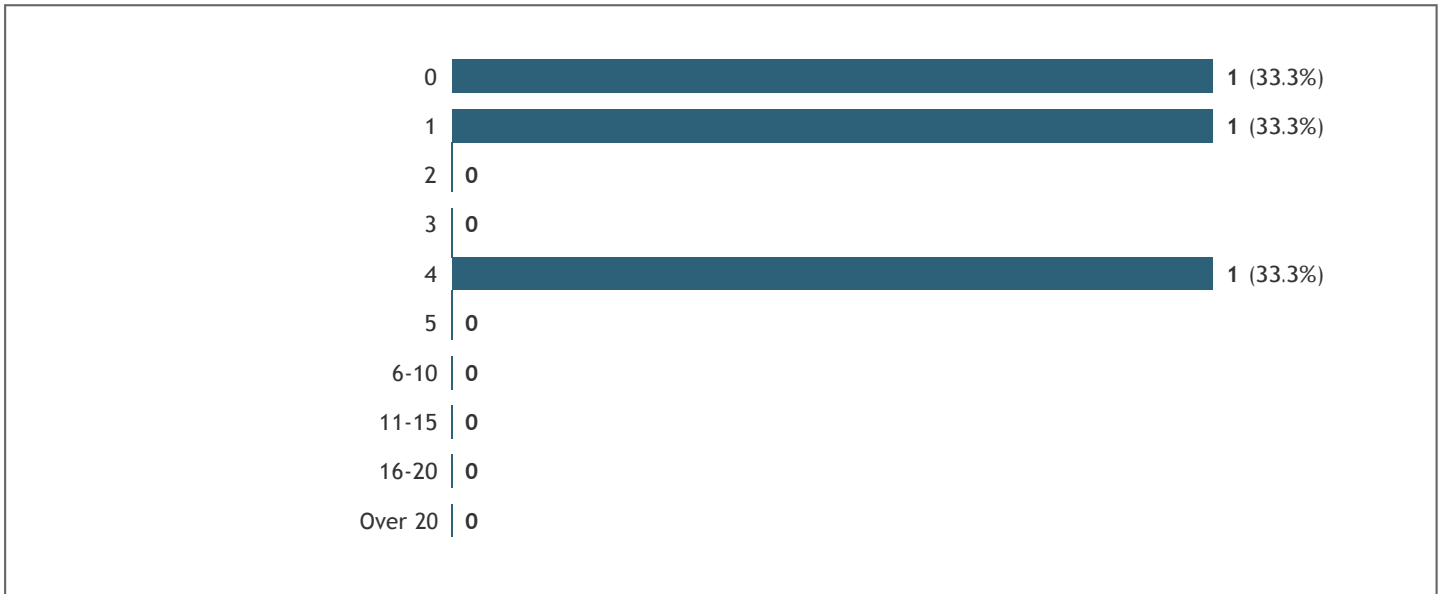
12	0
13	0
14	0
15	0
16	0
17	0
18	0
19	0
20	0
21	0
22	0
23	0
24	1 (33.3%)
25	0
26	0
27	1 (33.3%)
28	0
29	0
30	0
31	0
32	0
33	0
34	0
35	0
36	0
37	0
38	0
39	0
40	0
41	0
42	0
43	0
44	0
45	0
46	0
47	0
48	0
49	0



130 How many full-time staff are employed at your company?



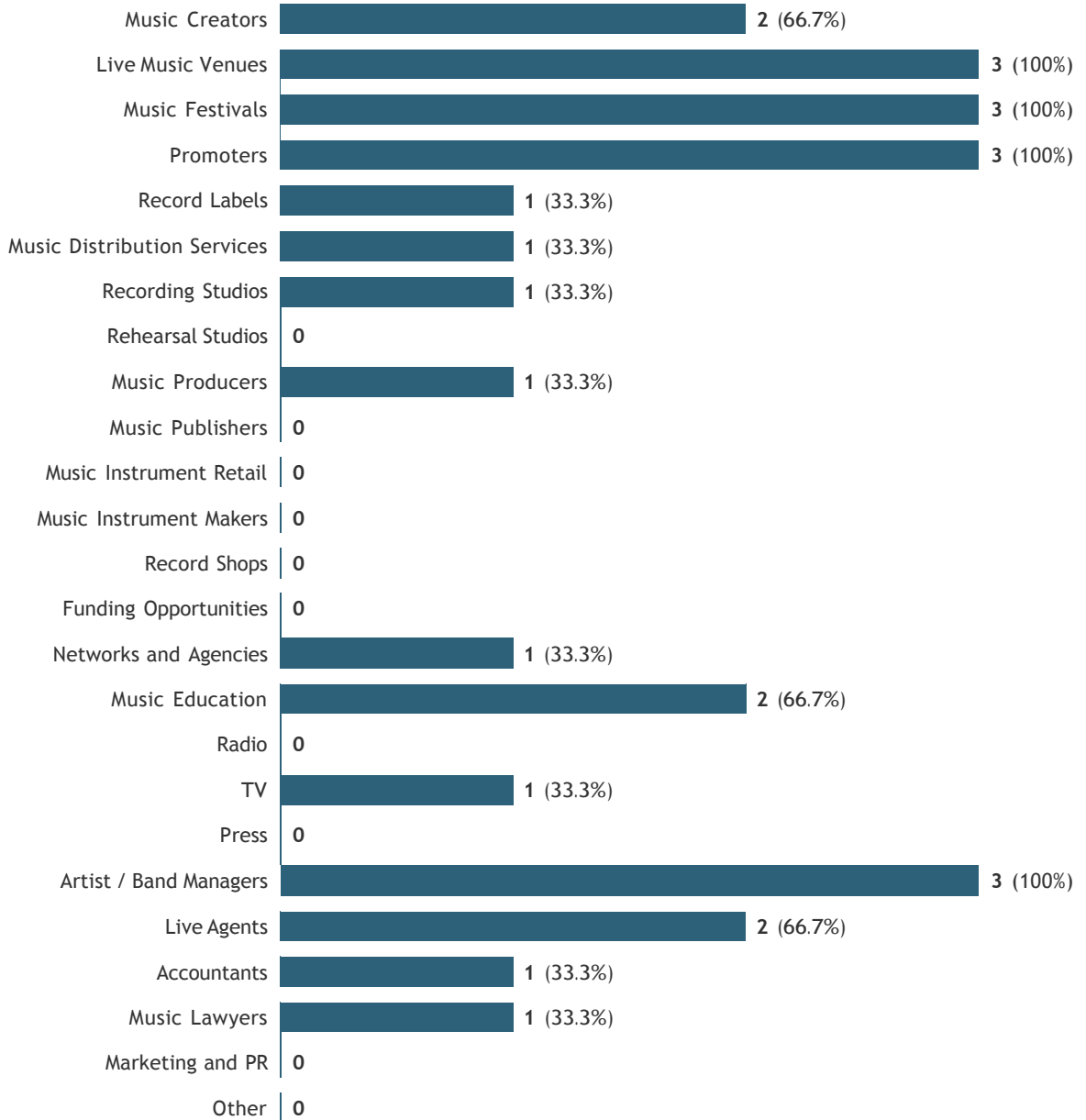
131 How many part-time staff are employed at your company?



132 What was your companies income for 2018?

Under £20,000	0
£20,000 – £49,999	0
£50,000 – £99,999	0
£100,000 – £149,999	0
£150,000 – £199,999	0
£200,000 - £249,999	0
£250,000 – £299,999	0
Over £300,000	 3 (100%)

133 Which music industry stakeholders do you interact with? (please select all that apply)

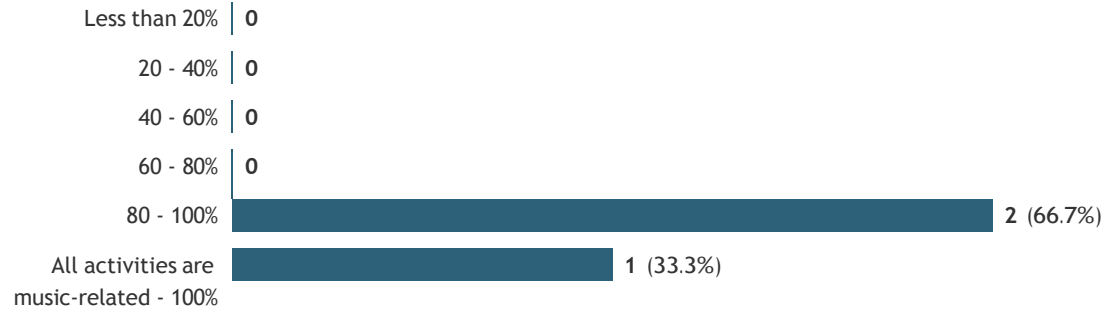


*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

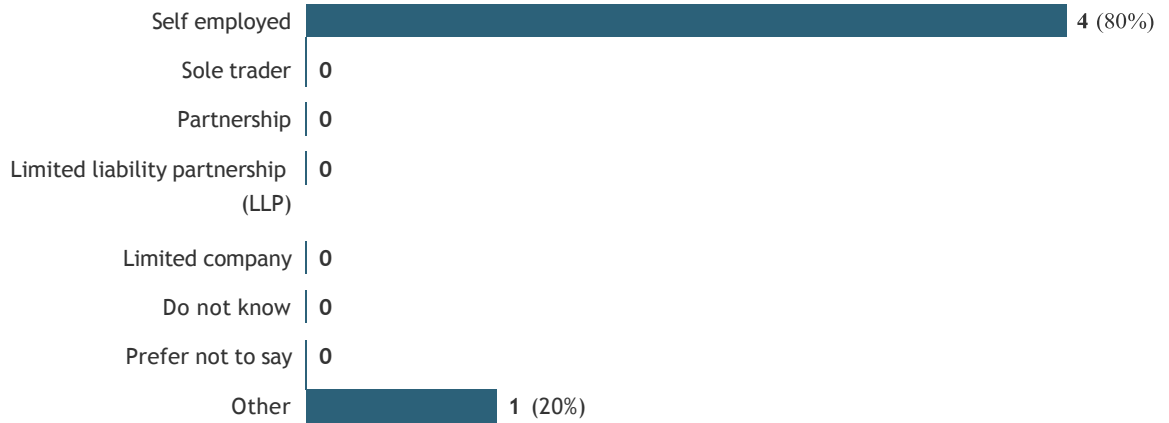
133.a If you selected Other, please specify:

*No responses*

134 How much of your companies revenue is generated by music-related activities?



**135** What best describes your business setup?

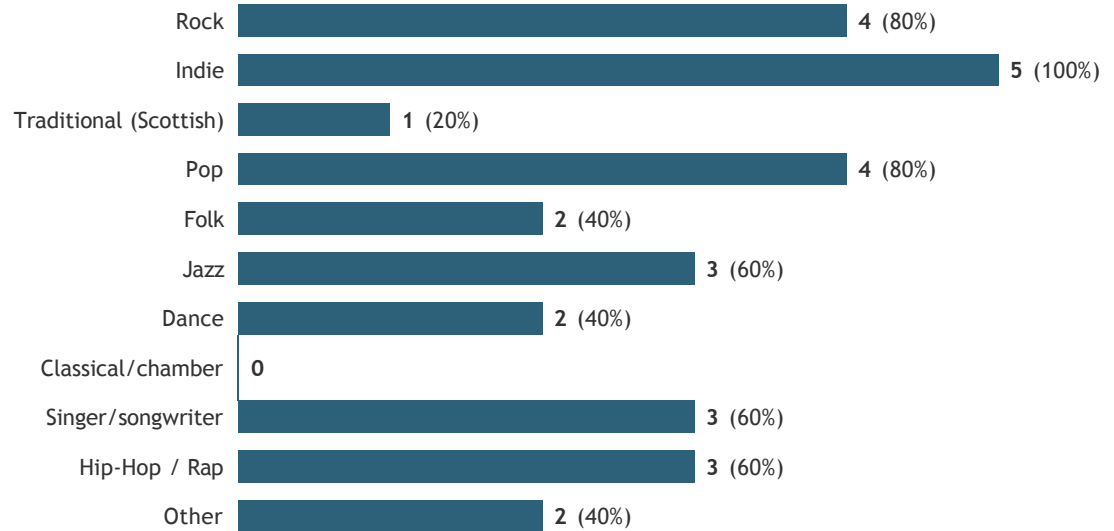


**135.a** If you selected Other, please specify:

Showing 1 response

NPO [741178-741169-82490873](#)

**136** What genres of music do you promote? (please select all that apply)



*Multi answer. Percentage of respondents who selected each answer option (e.g. 100% would represent that all the question's respondents chose that option)*

136.a If you selected Other, please specify:

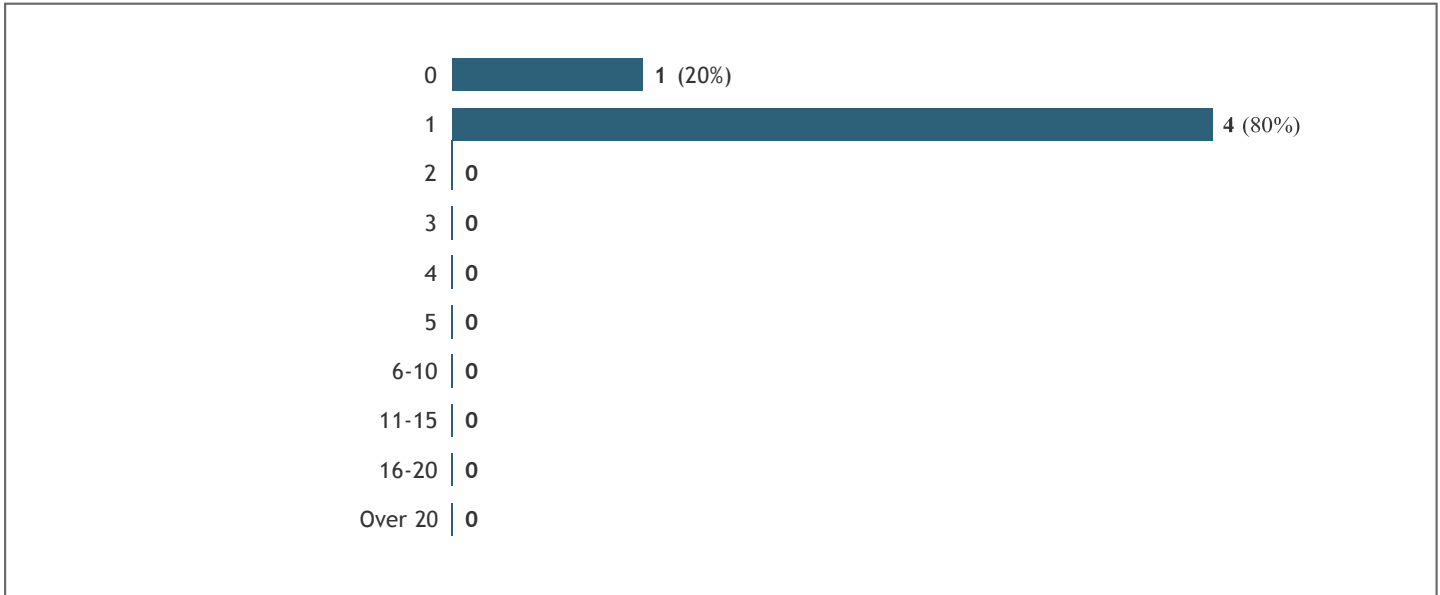
Showing all 2 responses	
world, Americana	741178-741169-81343900
Electronic	741178-741169-81422245

137 How many years has your business been trading?

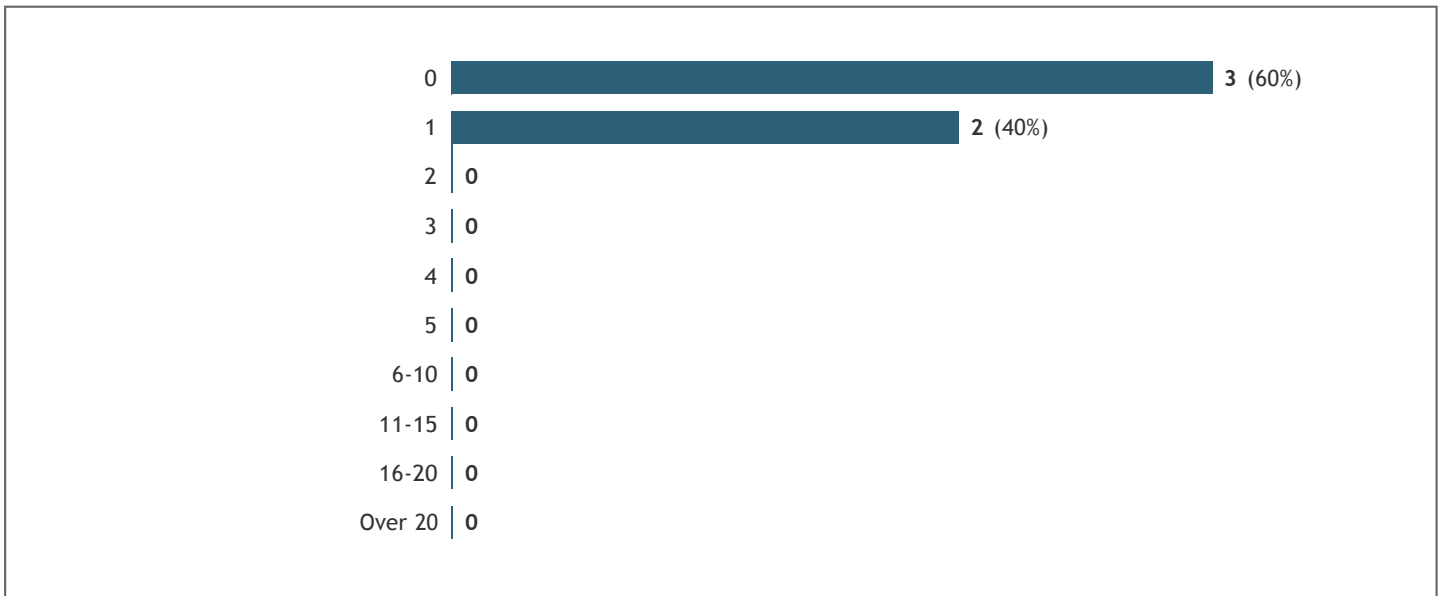


14		0	
15		0	
16		0	
17		1	(20%)
18		0	
19		1	(20%)
20		0	
21		0	
22		0	
23		0	
24		0	
25		0	
26		0	
27		0	
28		0	
29		0	
30		0	
31		0	
32		0	
33		0	
34		0	
35		0	
36		0	
37		0	
38		0	
39		0	
40		0	
41		0	
42		0	
43		0	
44		0	
45		0	
46		0	
47		0	
48		0	
49		0	
50		0	

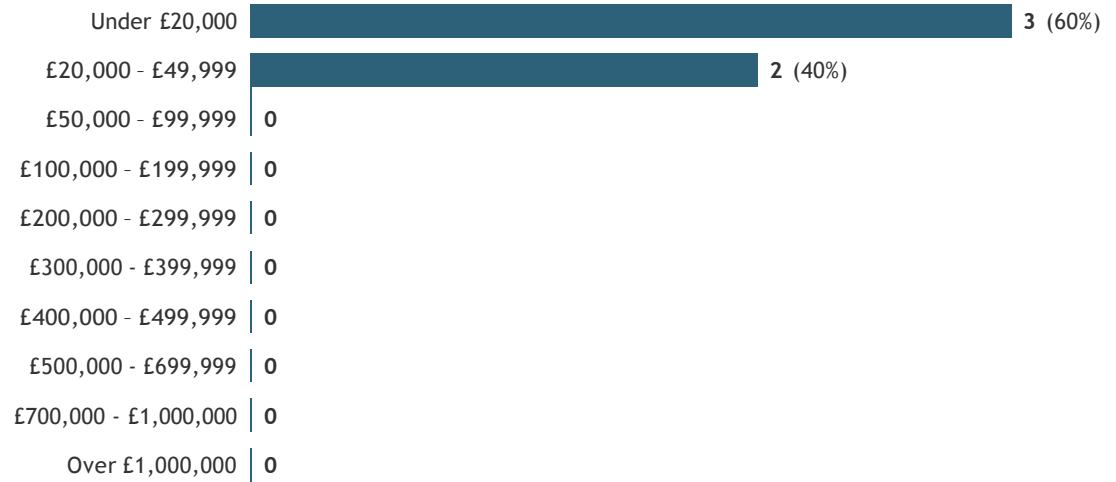
138 How many full-time staff are employed at your company?



139 How many part-time staff are employed at your company?



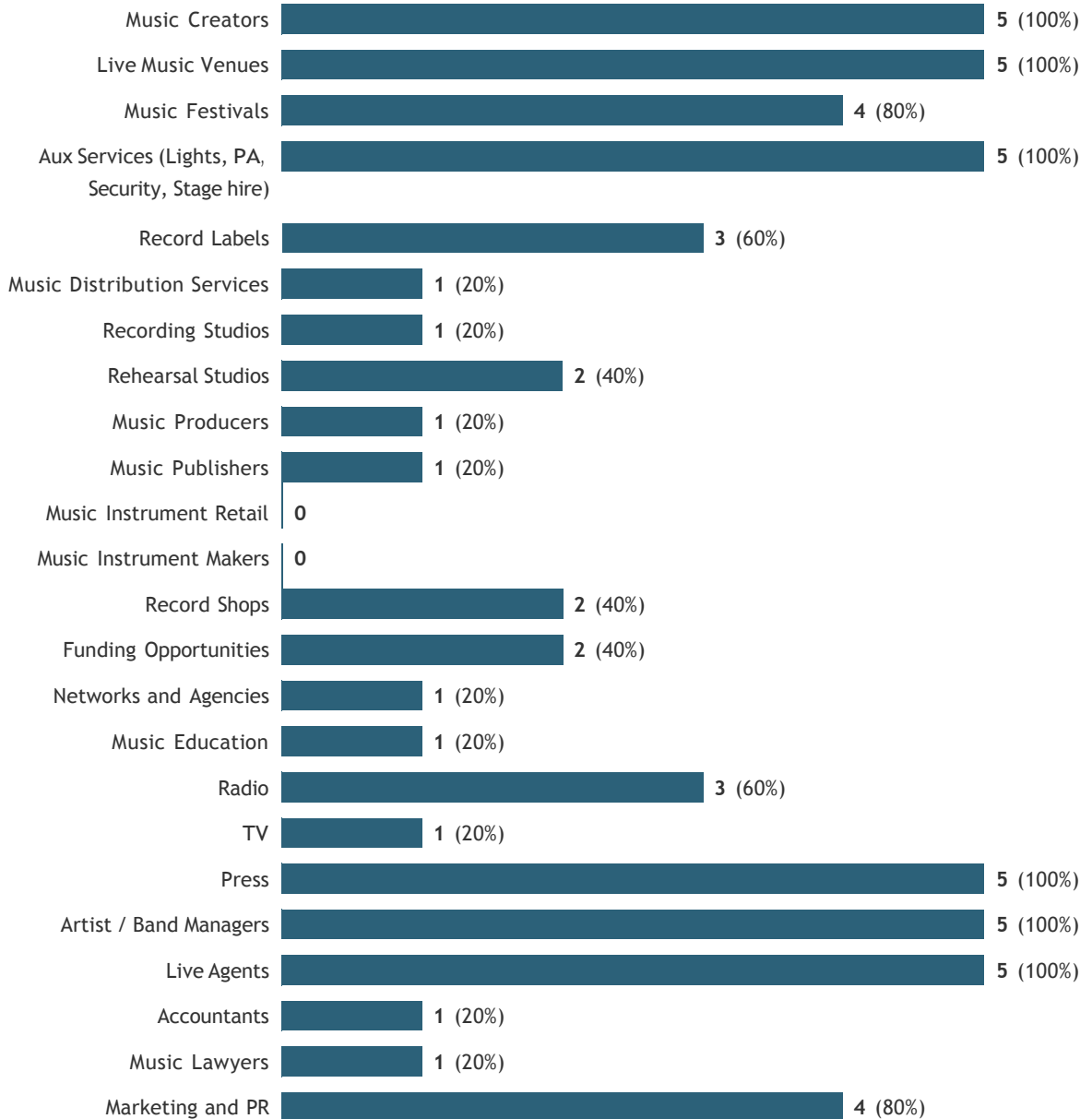
140 What was your income for 2018?



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**141** Which music industry stakeholders do you interact with? (please select all that apply)



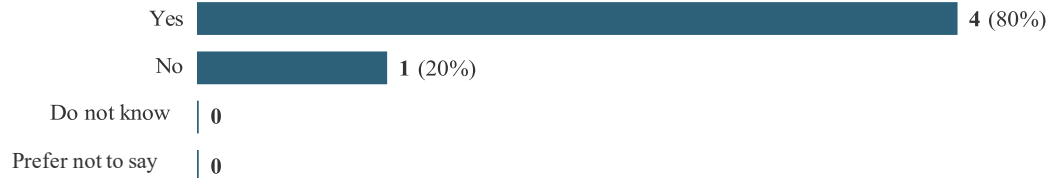


*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

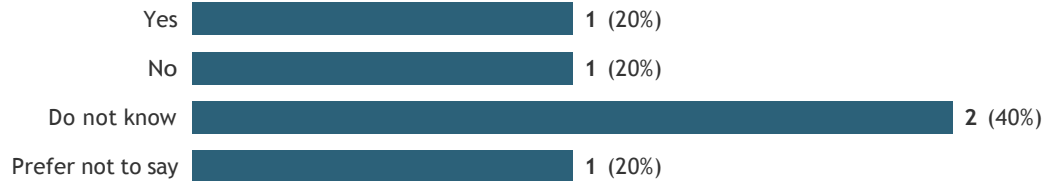
141.a If you selected Other, please specify:

*No responses*

142 Do you think it is possible to achieve an even gender split at festivals in Scotland?



**143** Is secondary ticketing a problem for the live music sector?



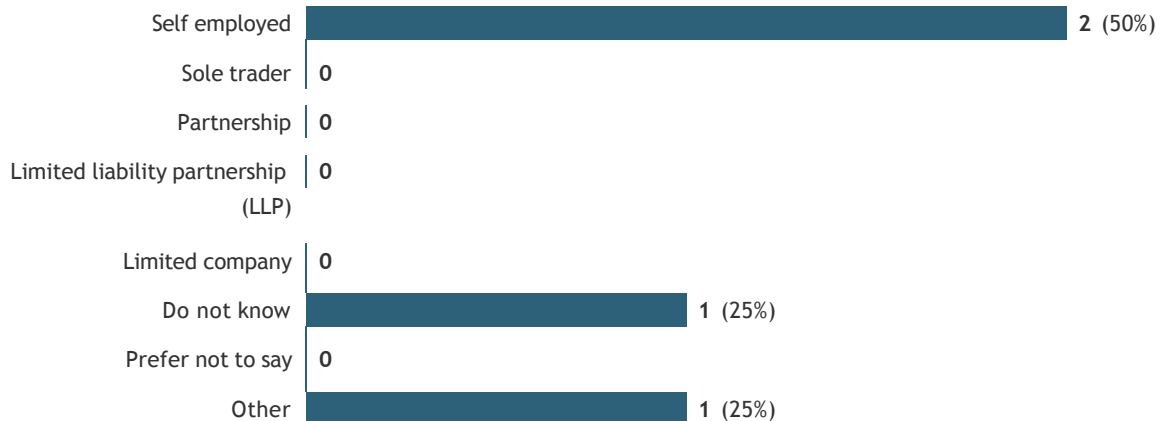
**143.a** If you selected Yes, please specify why.

Showing 1 response

Takes money out of the industry and disenfranchises genuine fans. Also undermines trust in the fairness of ticket distribution.

741178-741169-81343900

**144** What best describes your business setup?



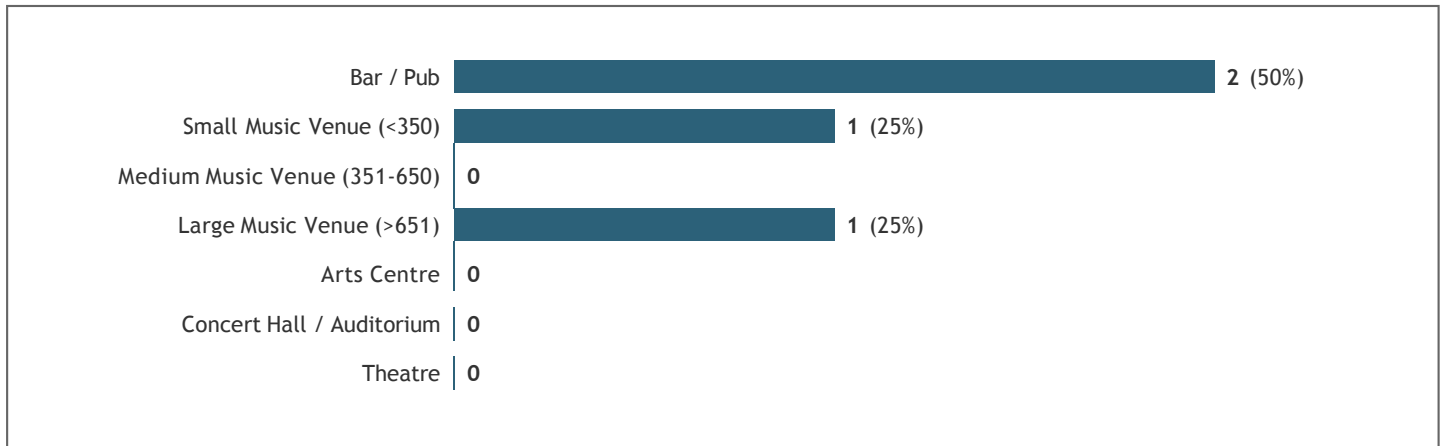
**144.a** If you selected Other, please specify:

Showing 1 response

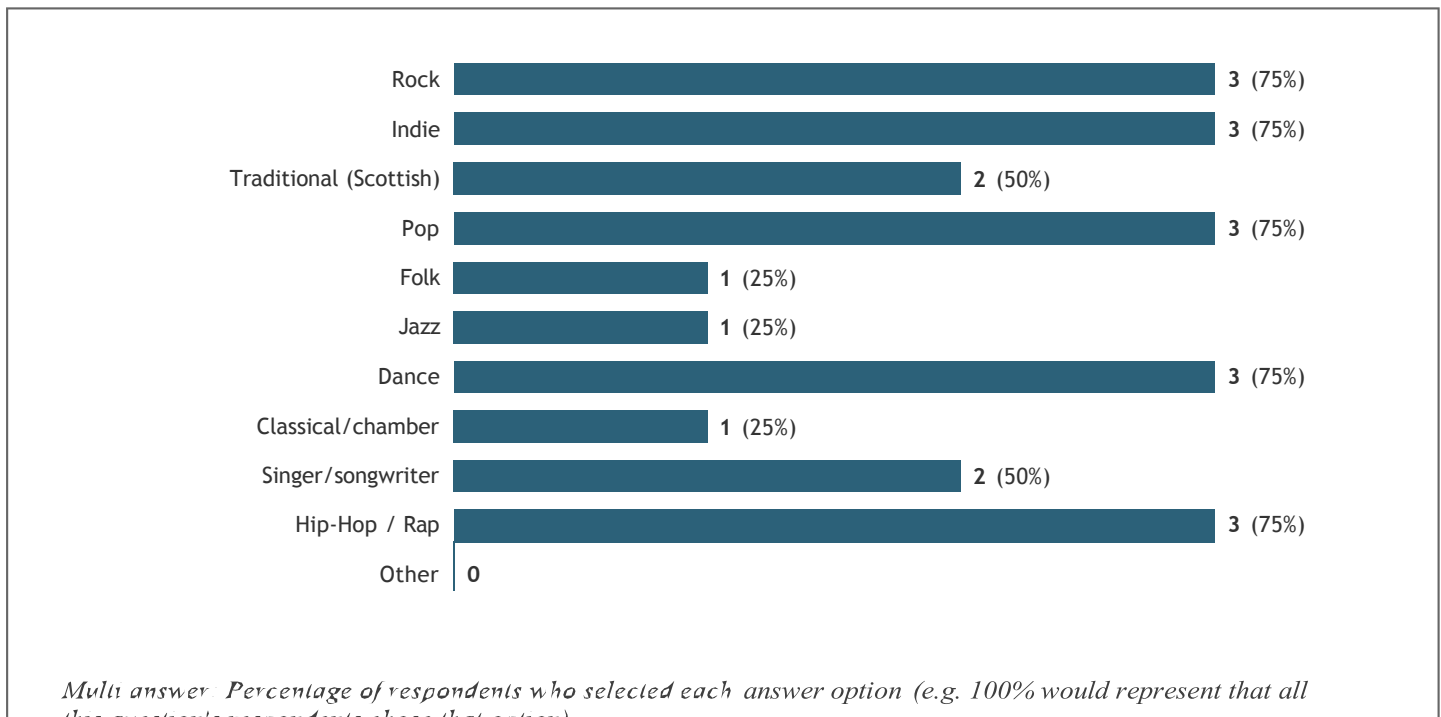
Community Interest Company

741178-741169-82070095

145 What type of venue do you operate?



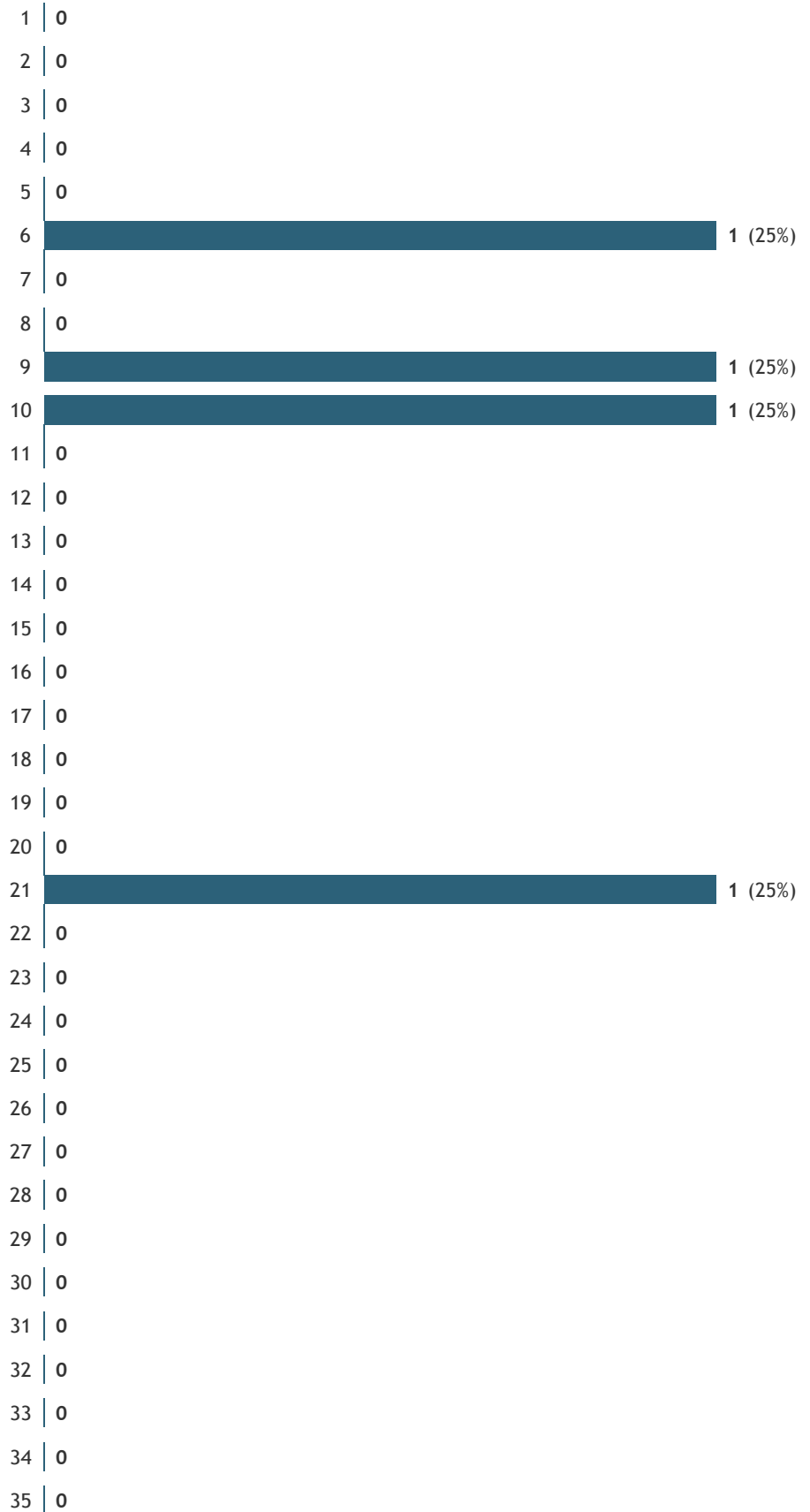
146 What genres of music does your work encompass? (please select all that apply)



146.a If you selected Other, please specify:

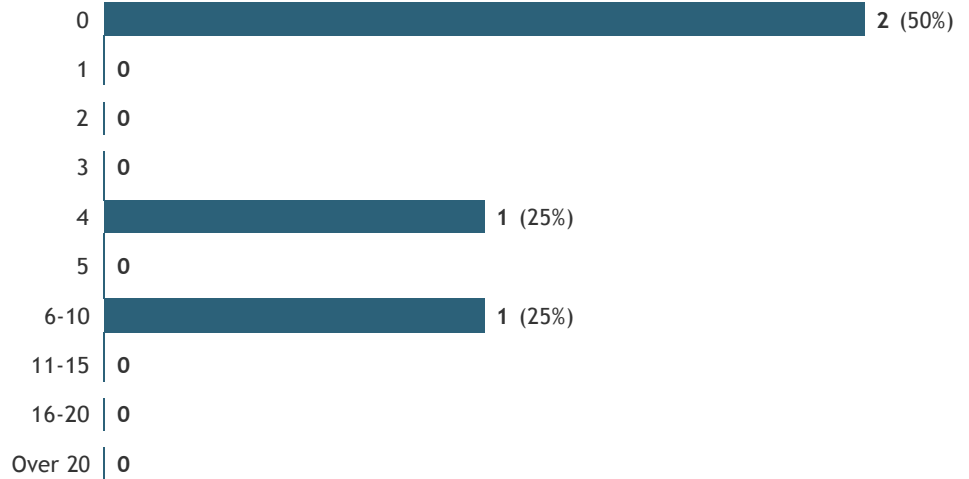
No responses

147 How many years has your business been trading?

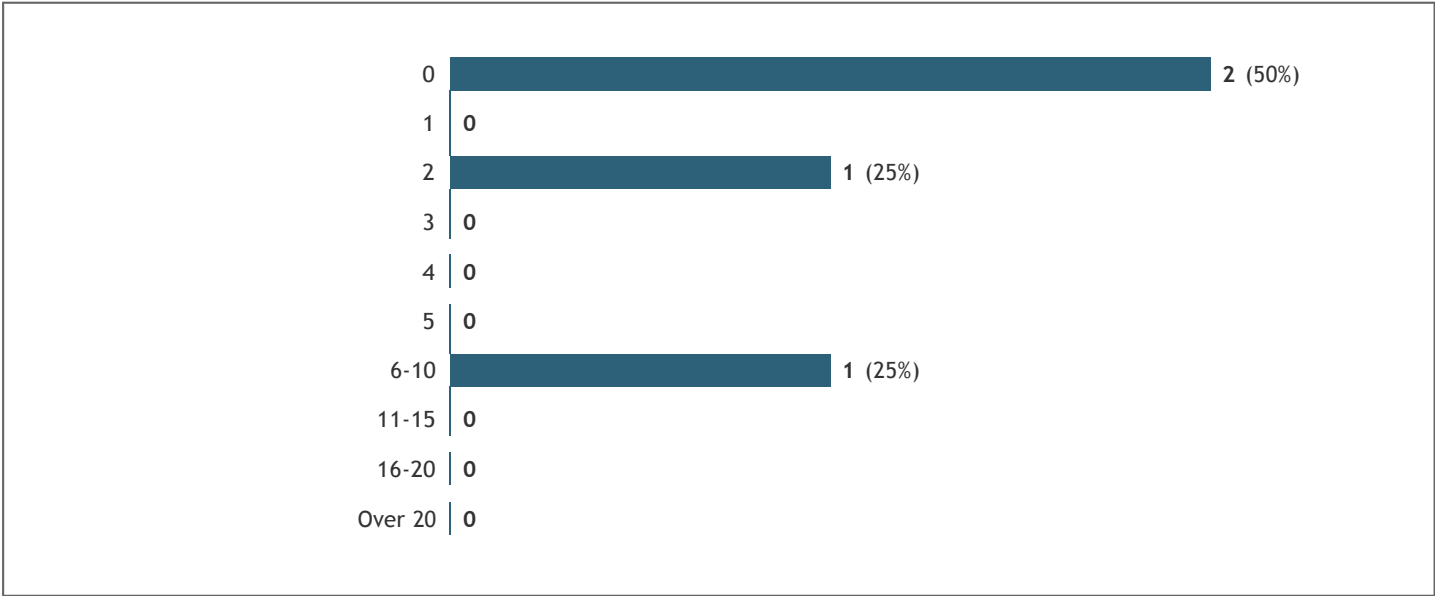


36 | 0  
37 | 0  
38 | 0  
39 | 0  
40 | 0  
41 | 0  
42 | 0  
43 | 0  
44 | 0  
45 | 0  
46 | 0  
47 | 0  
48 | 0  
49 | 0  
50 | 0

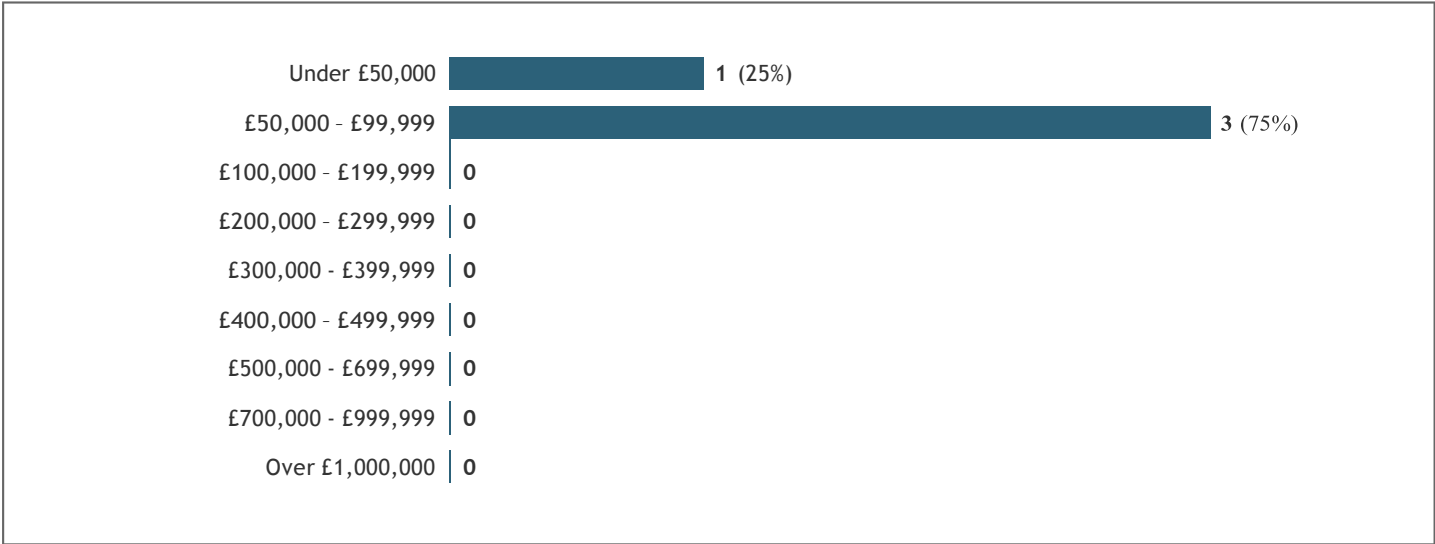
148 How many full-time staff are employed at your company?



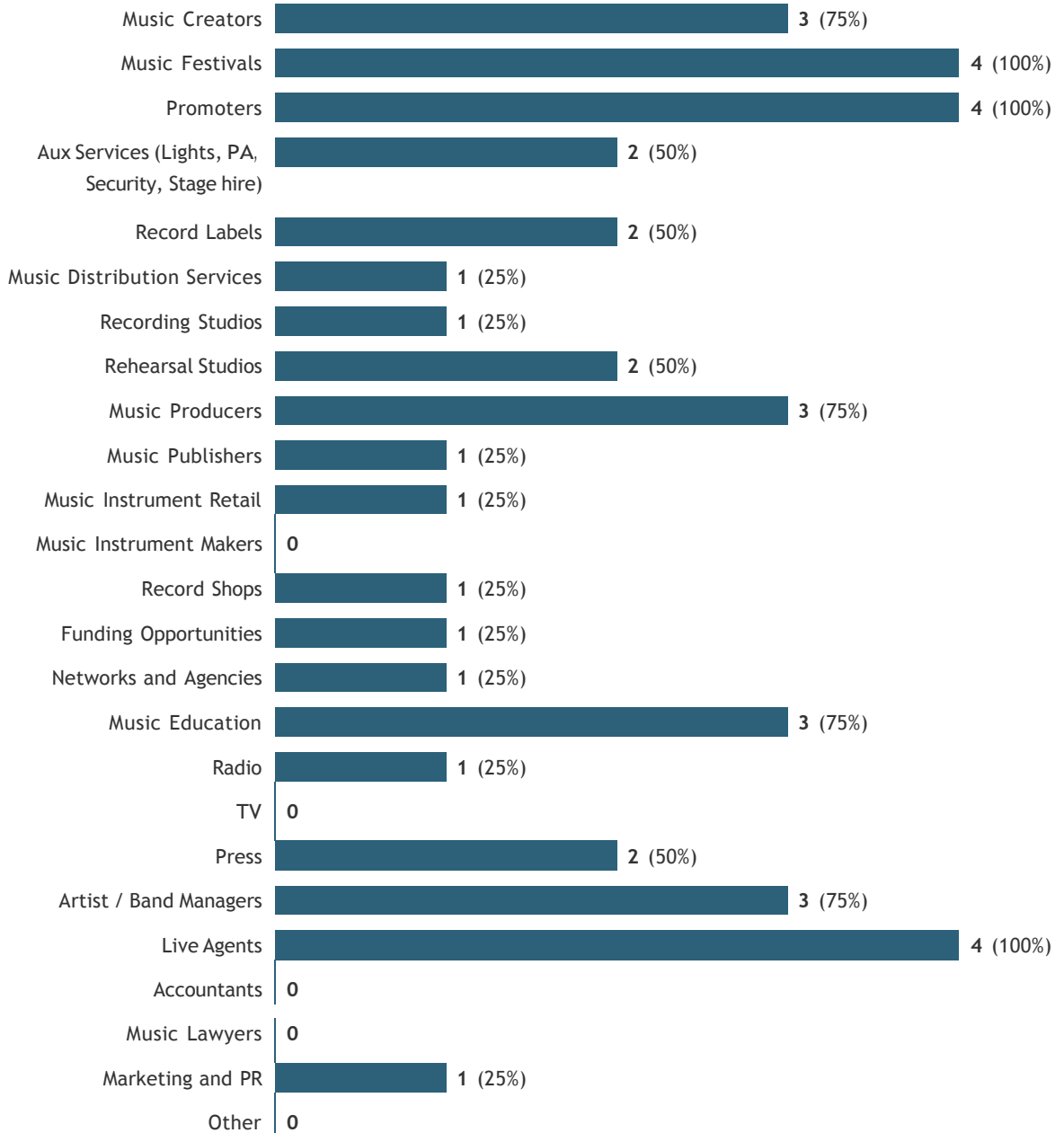
149 How many part-time staff are employed at your company?



**150** What was your income for 2018?



**151** Which music industry stakeholders do you interact with? (please select all that apply)



*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

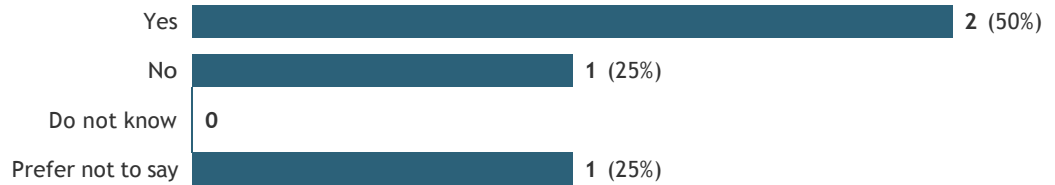
151.a If you selected Other, please specify:

*No responses*

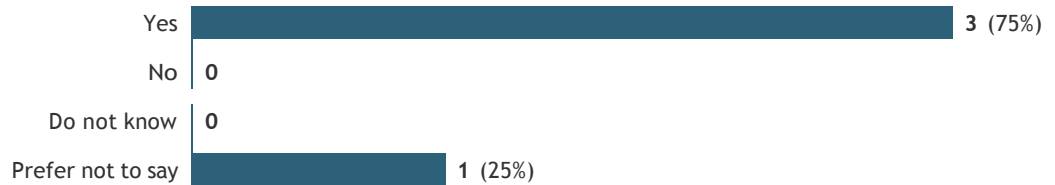
152 What method does your venue adopt to stage gigs?



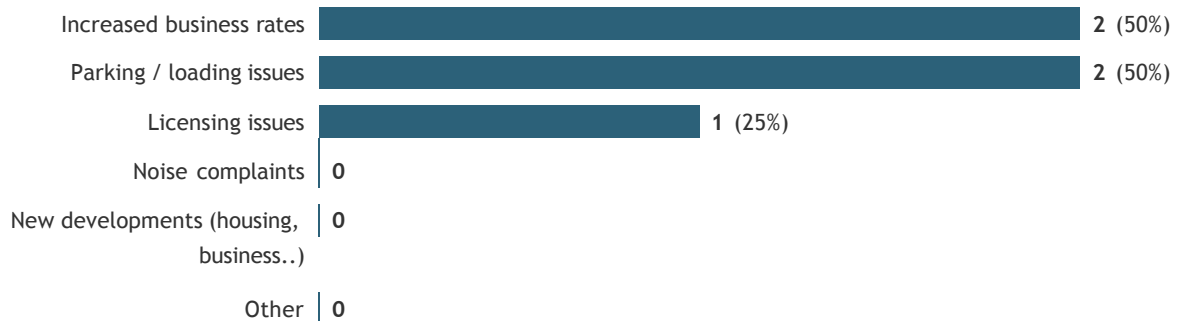
**153** Do you provide disabled access at your venue?



**154** Do you provide a safe space for women or promote any types of initiatives relating to this?



**155** Have you had any issues with the following factors in the last five years? (please select all that apply)



*Multi answer. Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*



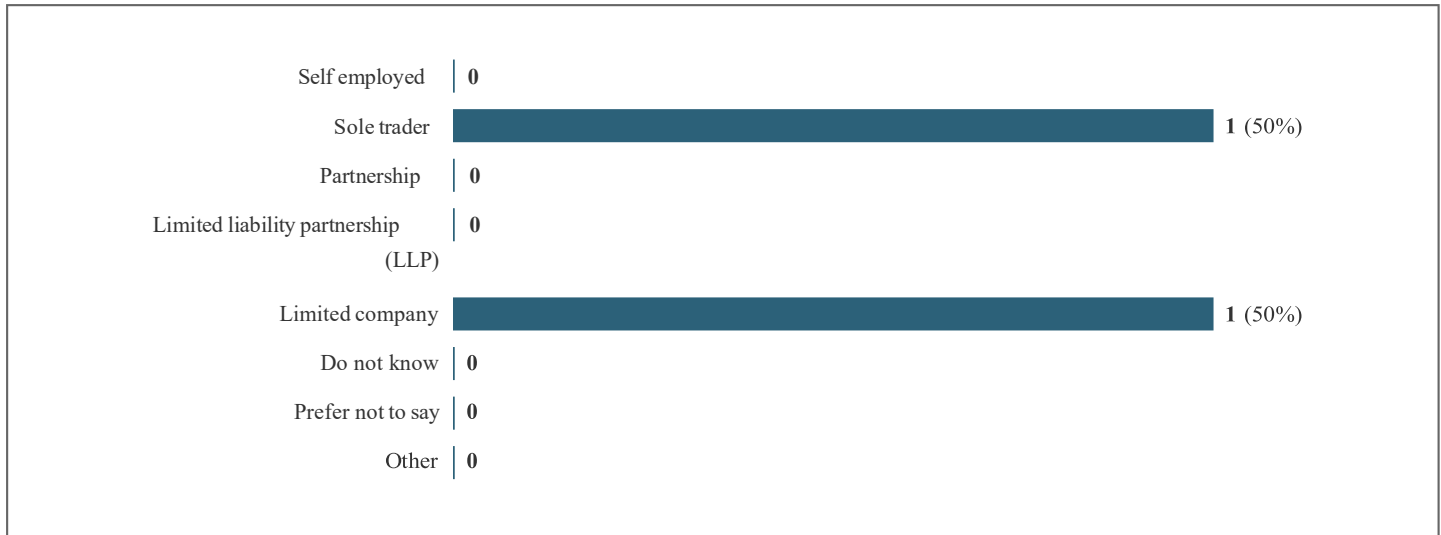
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155.a If you selected Other, please specify:

*No responses*

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156 What best describes your business setup?



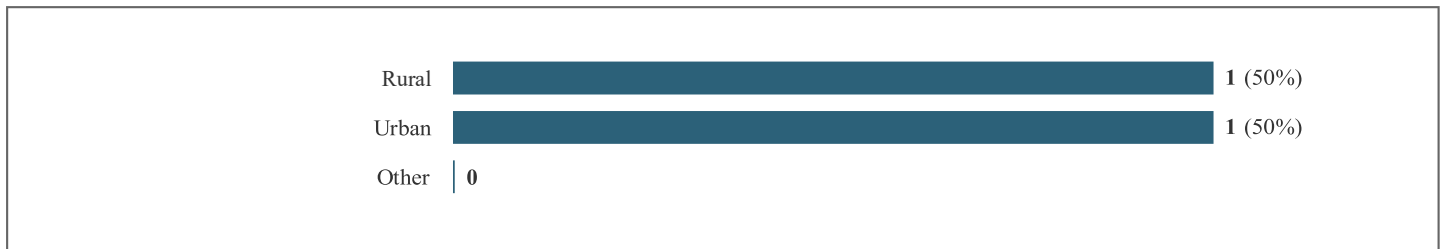
---

156.a If you selected Other, please specify:

*No responses*

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157 What is your festivals setting?



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157.a If you selected Other, please specify:

*No responses*

---

158 What genres of music does your festival host? (please select all that apply)



*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all the question's respondents chose that option)*

158.a If you selected Other, please specify:

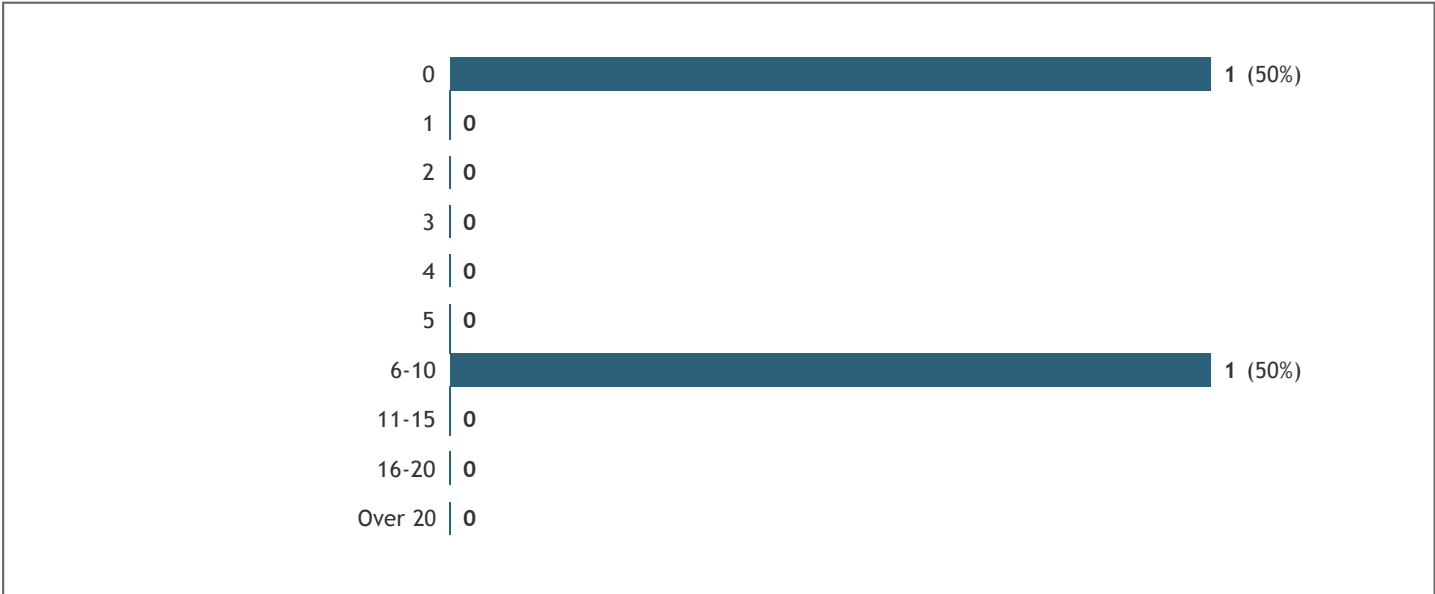
Showing 1 response

BLUES! 741178-741169-81436761

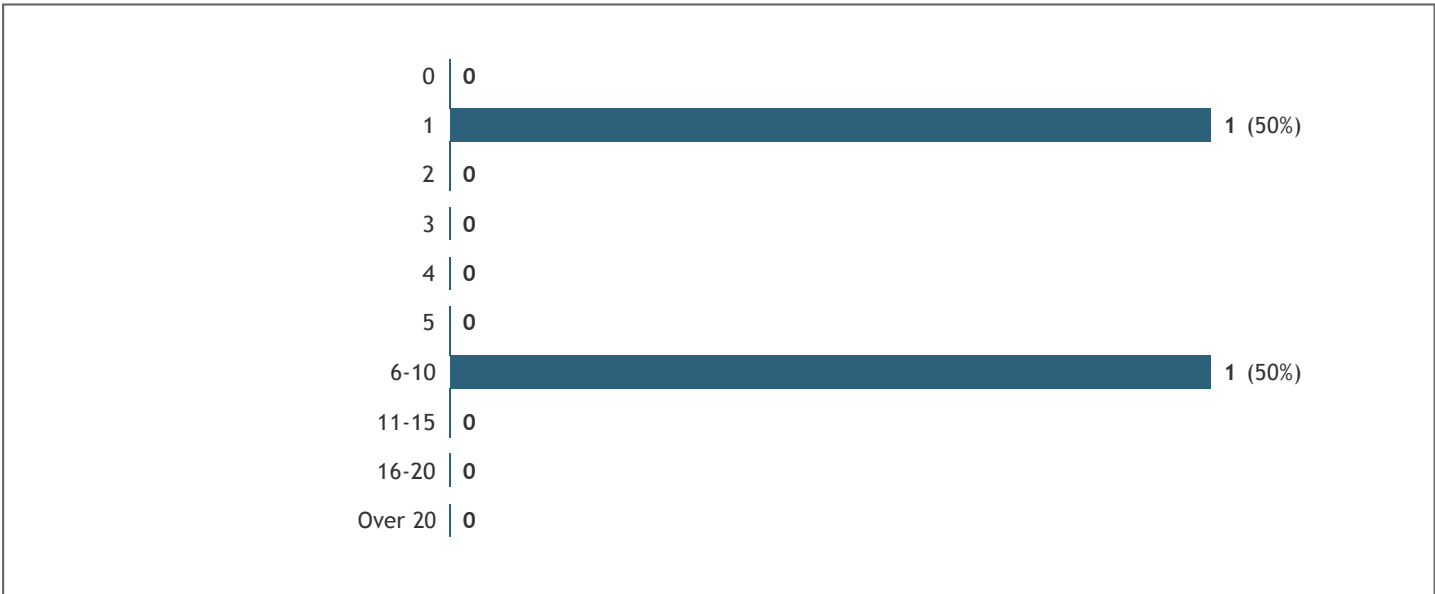
159 How long has your festival been operating?



160 How many full-time staff are employed at your company?



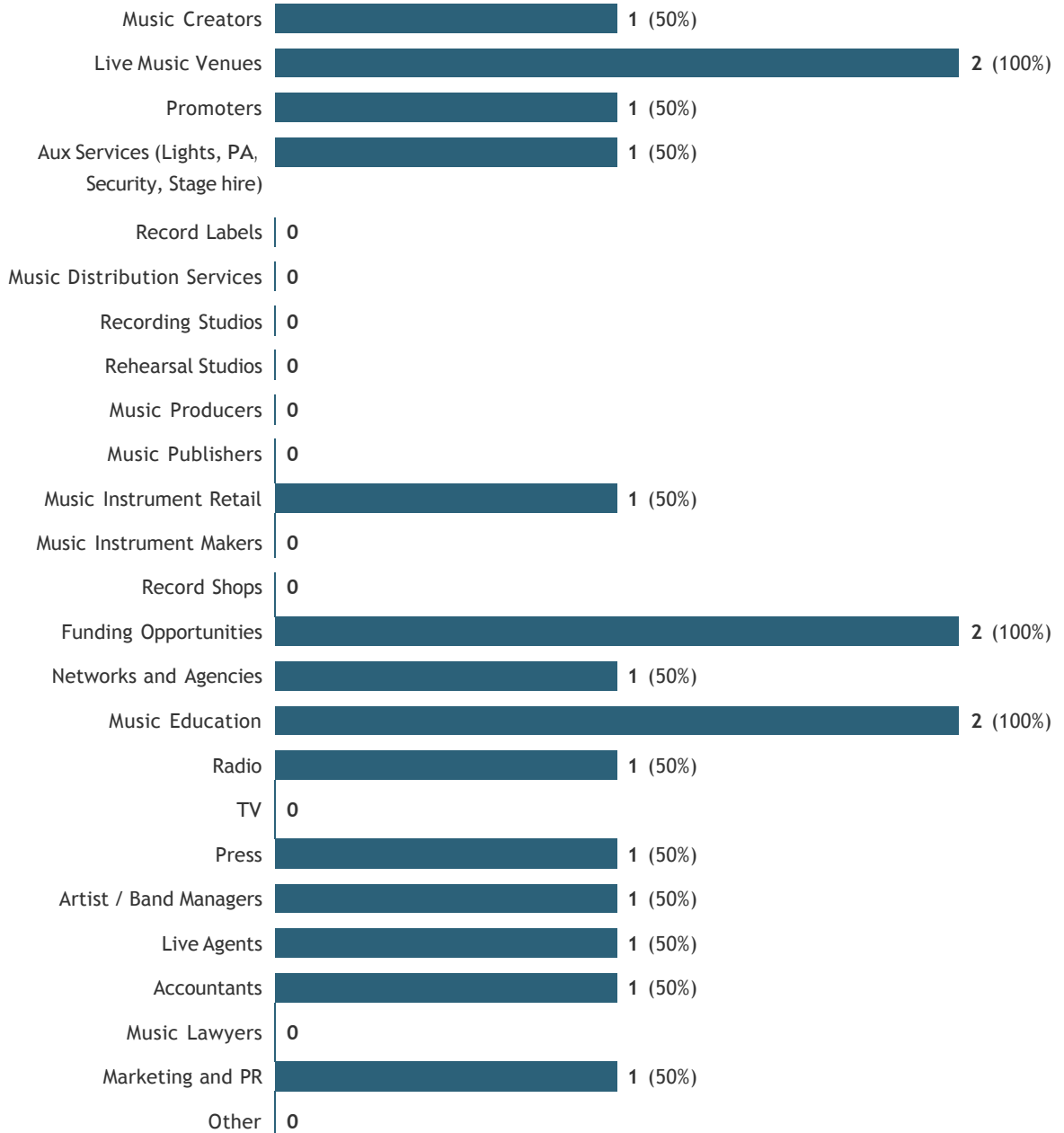
161 How many part-time staff are employed at your company?



162 What was your festivals income for 2018?



163 Which music industry stakeholders do you interact with? (please select all that apply)



*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

163.a If you selected Other, please specify:

*No responses*

164 Do you actively pursue an even gender balance at your festival?



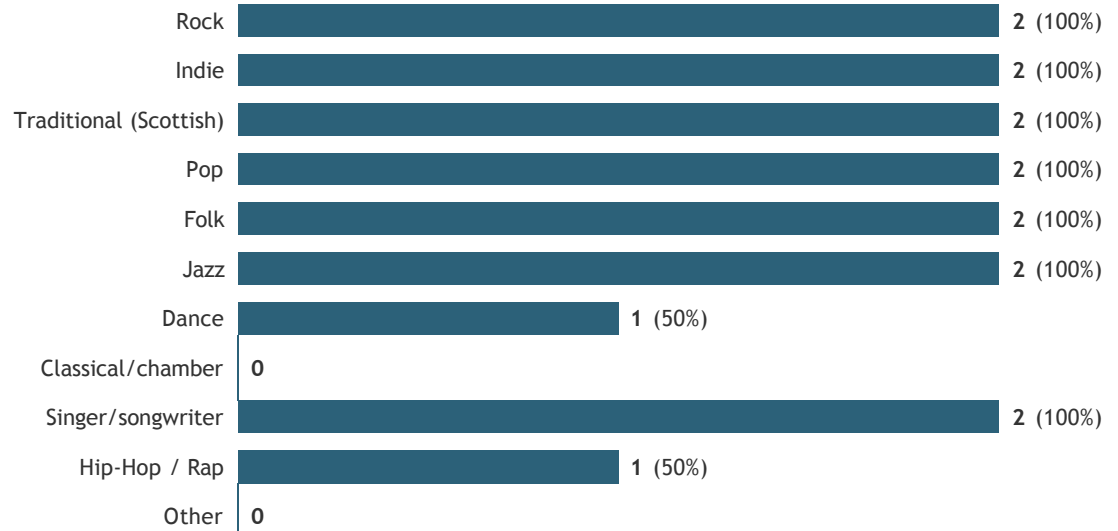
**165** What best describes your business setup?



**165.a** If you selected Other, please specify:

*No responses*

**166** What genres of music does your work encompass? (please select all that apply)

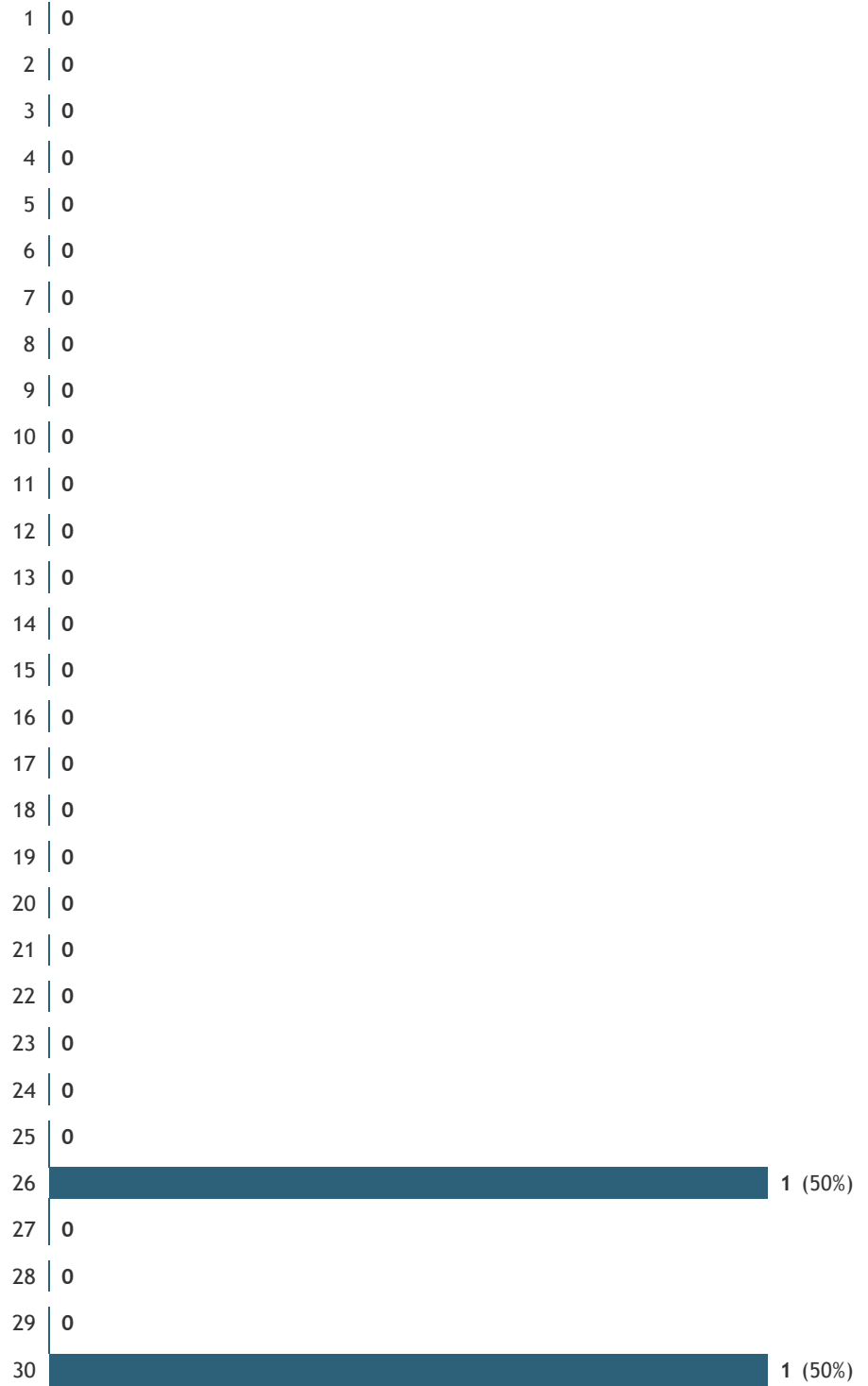


*Multi answer. Percentage of respondents who selected each answer option (e.g. 100% would represent that all the question's respondents chose that option)*

166.a If you selected Other, please specify:

*No responses*

167 How many years have you worked in the live sector?



168 What was your income for 2018?

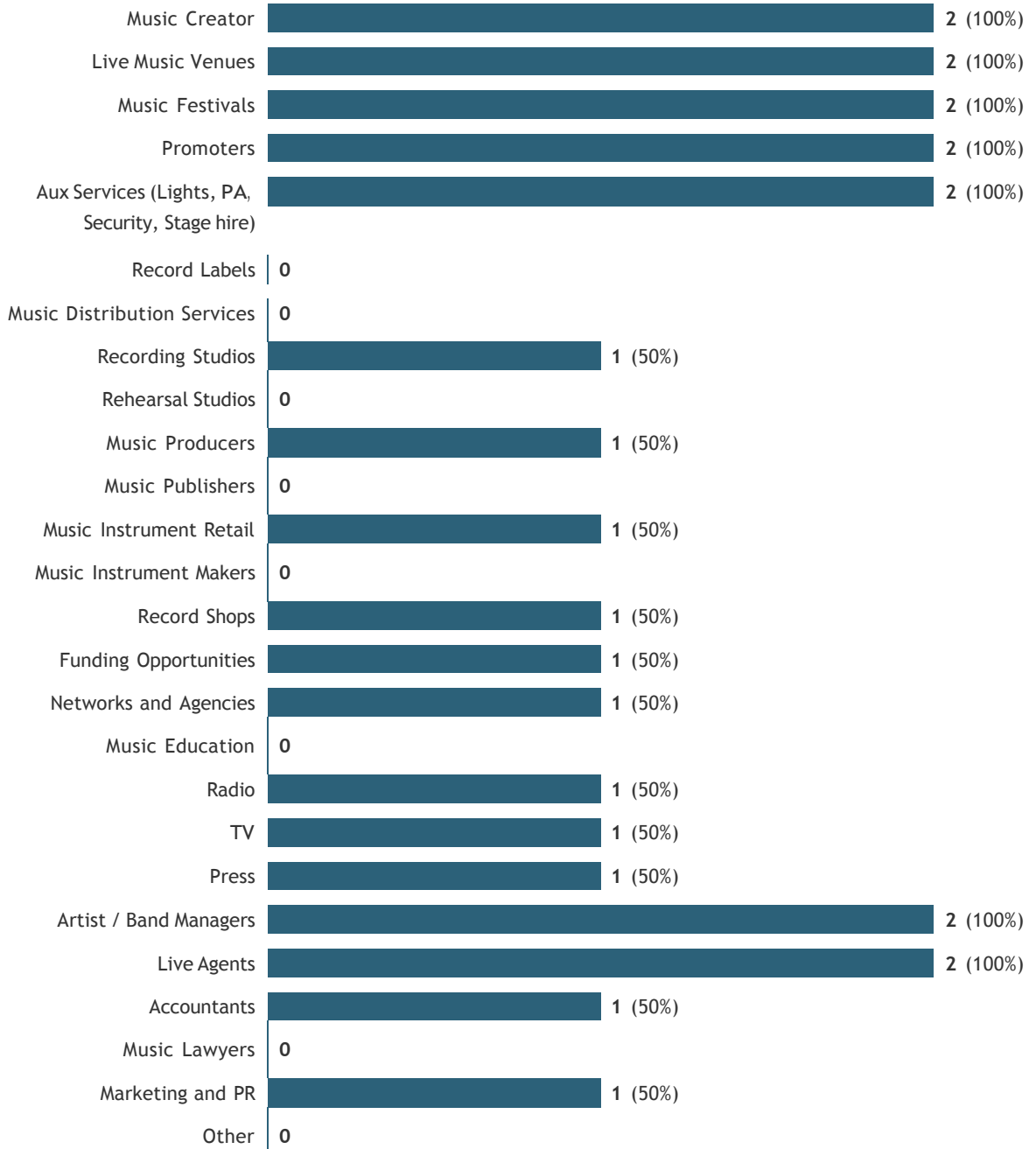


Under £9,999		0
£10,000 – £19,999		0
£20,000 – £29,999		0
£30,000 – £39,999		0
£40,000 – £49,999		0
£50,000 - £69,999		1 (100%)
£70,000 – £79,999		0
£80,000 - £89,999		0
£90,000 - £99,999		0
Over £100,000		0

169 In an average month, how many days do you work?

1		0
2		0
3		0
4		0
5		0
6		0
7		0
8		0
9		0
10		0
11		0
12		0
13		0
14		0
15		0
16		0
17		0
18		0
19		0
20		0
21		0
22		1 (100%)
23		0
24		0
25		0
26		0
27		0
28		0
29		0
30		0
31		0

170 Which music industry stakeholders do you interact with? (please select all that apply)



*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

170.a If you selected Other, please specify:

*No responses*

171 What best describes your business setup?

Self employed		0
Sole trader		0
Partnership		0
Limited liability partnership (LLP)		0
Limited company		0
Do not know		0
Prefer not to say		0
Other		0

171.a If you selected Other, please specify:

*No responses*

172 What genres of music does your work encompass? (please select all that apply)

Rock		0
Indie		0
Traditional (Scottish)		0
Pop		0
Folk		0
Jazz		0
Dance		0
Classical/chamber		0
Singer/songwriter		0
Hip-Hop / Rap		0
Other		0

*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

172.a If you selected Other, please specify:

*No responses*

173 How many years has your business been trading?

1 | 0  
2 | 0  
3 | 0  
4 | 0  
5 | 0  
6 | 0  
7 | 0  
8 | 0  
9 | 0  
10 | 0  
11 | 0  
12 | 0  
13 | 0  
14 | 0  
15 | 0  
16 | 0  
17 | 0  
18 | 0  
19 | 0  
20 | 0  
21 | 0  
22 | 0  
23 | 0  
24 | 0  
25 | 0  
26 | 0  
27 | 0  
28 | 0  
29 | 0  
30 | 0  
31 | 0  
32 | 0  
33 | 0  
34 | 0  
35 | 0  
36 | 0  
37 | 0

38		0
39		0
40		0
41		0
42		0
43		0
44		0
45		0
46		0
47		0
48		0
49		0
50		0

---

**174** How many full-time staff are employed at your company?

0		0
1		0
2		0
3		0
4		0
5		0
6-10		0
11-15		0
16-20		0
Over 20		0

---

**175** How many part-time staff are employed at your company?

0		0
1		0
2		0
3		0
4		0
5		0
6-10		0
11-15		0
16-20		0
Over 20		0

**176** What was your companies income for 2018?

Under £10,000		0
£10,000 – £19,999		0
£20,000 – £29,999		0
£30,000 – £39,999		0
£40,000 – £49,999		0
£50,000 - £69,999		0
£70,000 – £99,999		0
Over £100,000		0

**177** Which music industry stakeholders do you interact with? (please select all that apply)

Music Creators	0
Live Music Venues	0
Music Festivals	0
Promoters	0
Record Labels	0
Music Distribution Services	0
Recording Studios	0
Music Producers	0
Music Publishers	0
Music Instrument Retail	0
Music Instrument Makers	0
Record Shops	0
Funding Opportunities	0
Networks and Agencies	0
Music Education	0
Radio	0
TV	0
Press	0
Artist / Band Managers	0
Live Agents	0
Accountants	0
Music Lawyers	0
Marketing and PR	0
Other	0

*Multi answer: Percentage of respondents who selected each answer option (e.g. 100% would represent that all this question's respondents chose that option)*

177.a If you selected Other, please specify:

*No responses*

178 Have you lost earnings as a result of the Covid-19 pandemic?

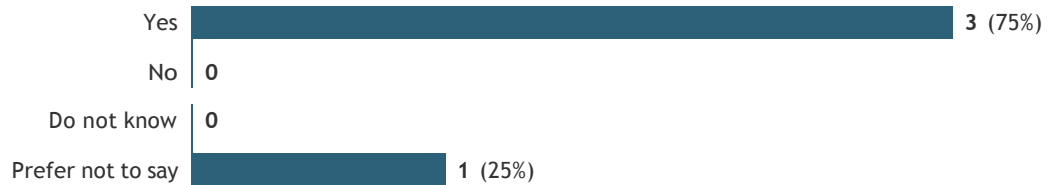




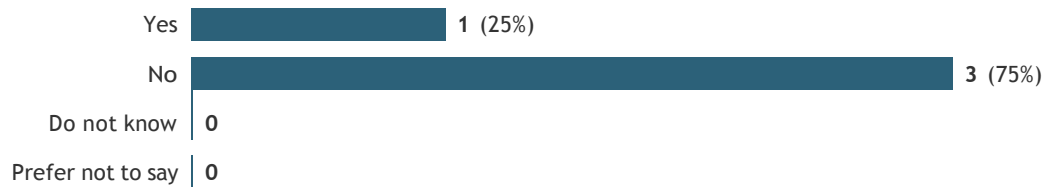
**179** What percentage of your usual work have you been able to conduct during the pandemic?



**180** Have you taken on additional work outside the music industries during the pandemic as a result of financial hardship?



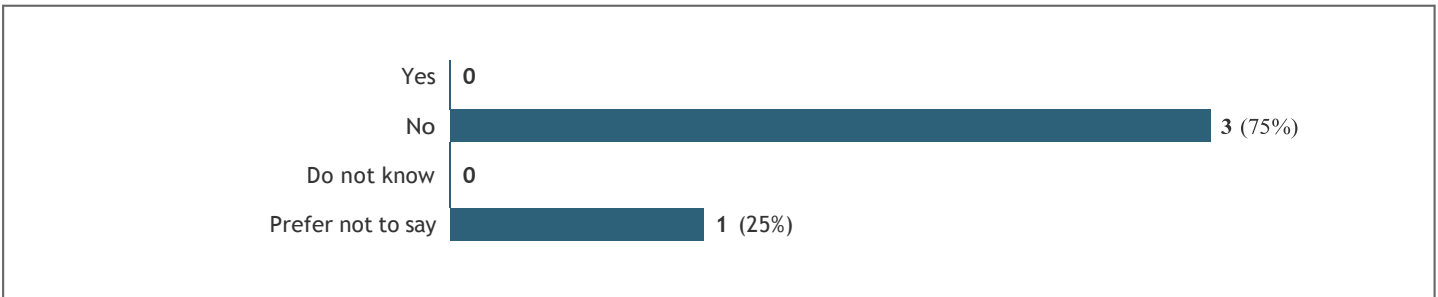
**181** Did you apply for any Covid relief funds?



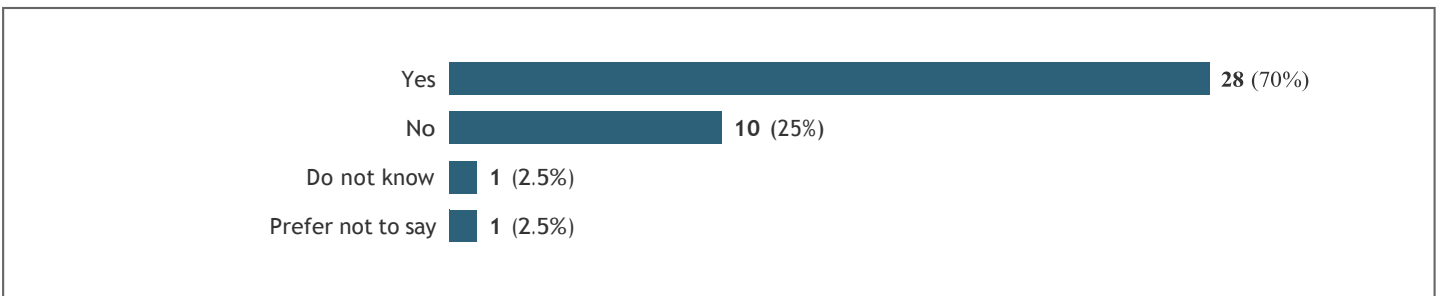
181.a If you selected Yes, please specify whether you were succesful.

Showing 1 response	
partially	741178-741169-82068515

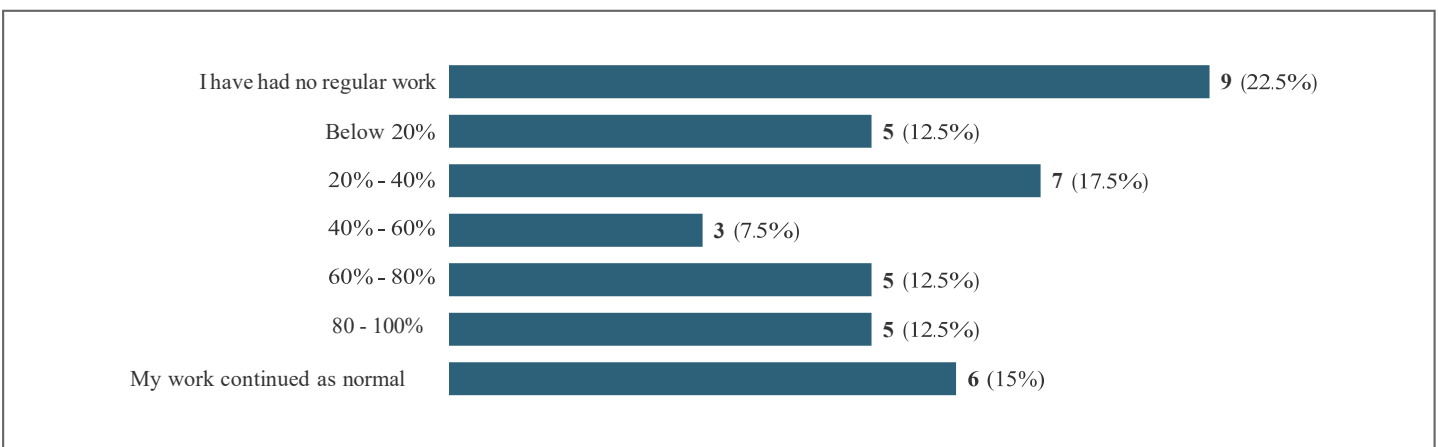
182 As a freelancer/self-employed, have you received an adequate level of financial support during the pandemic?



183 Have you lost earnings as a result of the Covid-19 pandemic?

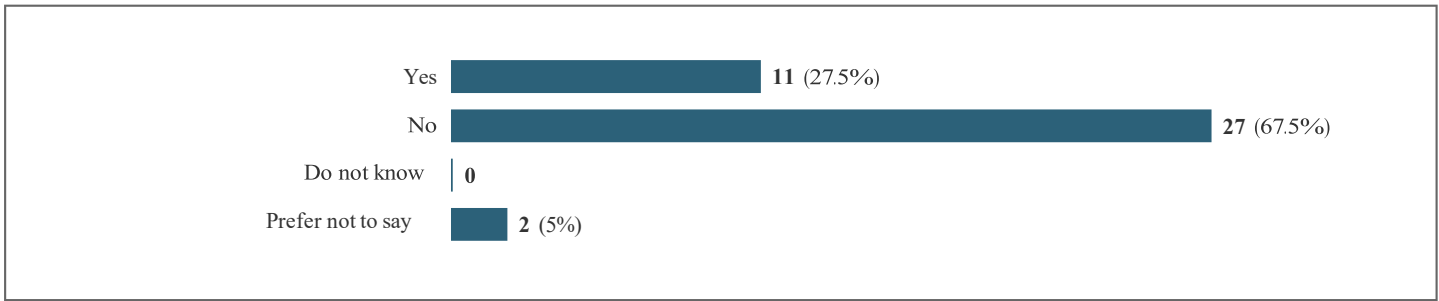


184 What percentage of your usual work have you been able to conduct during the pandemic?

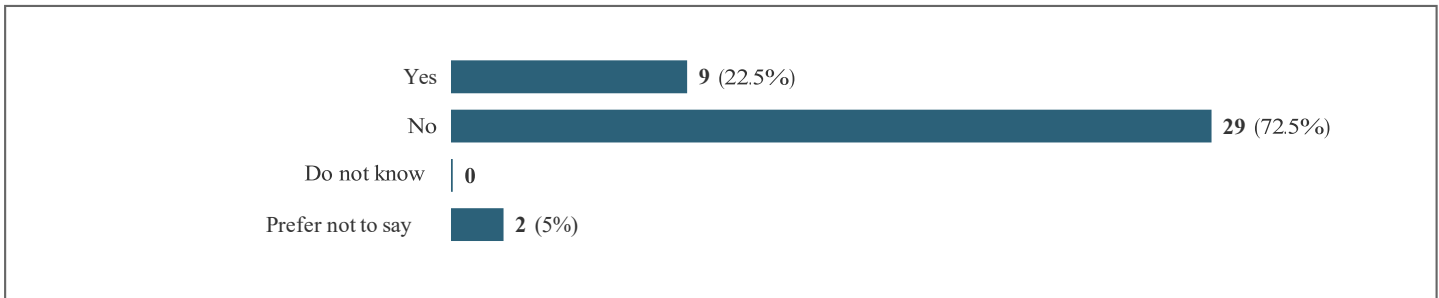


185 Have you taken on additional work outside the music industries during the pandemic as a result of

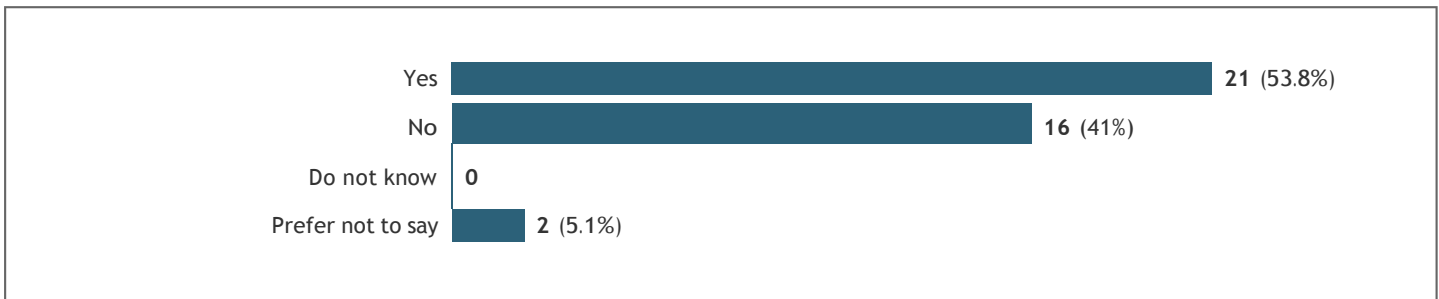
financial hardship?



**186** Has your company let go of staff as a result of the pandemic?



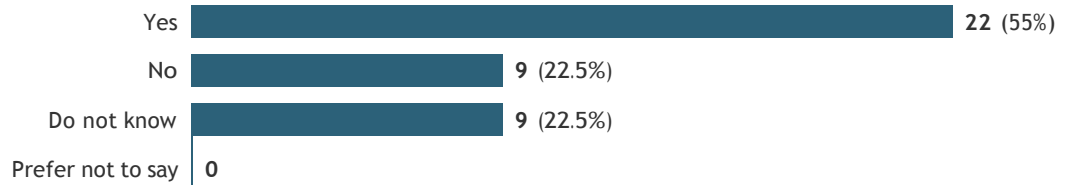
**187** Did you or your company apply for any Covid relief funds?



**187.a** If you selected Yes, please specify whether you were successful.

Showing first 5 of 21 responses	
Yes a small amount	741178-741169-81333851
partly	741178-741169-81334679
Yes	741178-741169-81334423
Yes	741178-741169-81335127
Successful	741178-741169-81336183

**188** Has Covid-19 impacted your companies growth in the music industries for the period 2020/21?



188.a If yes, what projected percentage of growth has been lost as a result of the Covid-19 pandemic?

