



**YOUTH
MUSIC**

THE SOUND OF THE NEXT GENERATION

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

By Youth Music and Ipsos MORI

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Photo: The Garage

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**FOREWORD – MATT GRIFFITHS,
CEO OF YOUTH MUSIC**



Photo: Harvey Aspell

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

And how we listen to, participate in and involve ourselves in music has changed. The digital revolution has democratised our

participation in music. Music can be downloaded quickly at the touch of a button, if you fancy learning the guitar you can instantly click on an online tutorial. If you want to create some music, jump on a laptop, download some free software and away you go.

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

Again and again, the evidence we gather at Youth Music demonstrates powerfully the personal and social benefits of music-making, how young people benefit from this and develop their own coping strategies, which they draw on particularly in difficult times.

This year is Youth Music's 20th Anniversary. The support of the National Lottery through Arts Council England was our foundation in 1999 and has been our bedrock ever since. Over the last twenty years, almost 3 million young people have benefitted from our work, making music to help transform their lives. We've observed significant changes in music education, the music industry, and the social, cultural and political environment. Music has a massive influence on the lives of young people today; perhaps more than for any previous generation. Against this backdrop we thought it was time to provide an up-to-date picture – to hear the sound of the next generation.

So, it's time to reflect, look back *and* look forward. We want to use this research to campaign with and on behalf of young people for the importance of music-making in their lives. The findings have shown us that:

- It's time for a rethink in how music is valued to better capitalise on its potential for society and ensure it's serving the needs of the 21st century musician. It's time for a new model in schools – one that's more industry-facing, based on partnership and with a focus on personal, social as well as musical outcomes.
- There's no doubt that a progressive and sustained music curriculum is a vital component of the inclusion mix – most young people go to school. But it does need to be more progressive with greater innovation so that young people see it as a relevant part of their lives in music rather than being separate to it.
- Music education and the music industry need to come closer together, to align their talent development strategies and ensure a diverse and skilled talent pipeline. This will involve concerted effort and combined resources from organisations that aren't currently working together.
- Creative and musical pastimes are core to how young people spend their time, interact with others, and have fun. But young people's everyday creativity doesn't receive the value or recognition it deserves. Ninety per cent of young people are regularly listening to music to create the mood and soundtracks of their lives. Brands and technology companies are jumping on this – yet listening to music is at best seen as a peripheral activity when it comes to education and wellbeing policy. Surely this is a missed opportunity?

This report is a call to action – it's time to shake up the way music is perceived, funded and delivered, in order to make it more inclusive, equitable, and relevant to young people's needs and interests. We've outlined a series of recommendations for national and local government, funders, schools, arts organisations and those working in the music industry – vital steps that will enable us to fully realise the transformative power of music in society.

WITH THANKS TO

Chi, 21
Ark T Music Project, Oxford

Fabrice*, 18
Northumberland, Tyne and Wear
NHS Foundation Trust, Newcastle

Hannah, 19
WILD Young Parents Project, Bodmin

Shelby, Phoebe, Kylie and Shona, 12-14
My Pockets, Hull

Dwight, Charlotte and Finlay, 14-15
Brighter Sound, Manchester

Leah, 18
Pedestrian, Corby

Taz, 17 and Kallum, 24
Romsey Mill, Cambridge

Filip, 14
Gem Arts, Newcastle-upon-Tyne

.....
Professor Susan Hallam, MBE
Emerita Professor of Education and Music Psychology at the UCL Institute of Education.

Jo Stockdale
Programme Director at Well Within Reach, formerly known as the Child Learning and Development Advisory Centre (CLADAC).

Vick Bain
CEO of BASCA, the British Academy of Songwriters and Composers.

Rebecca Allen
President of Decca Records in the UK.

*name changed



Photo: Brighter Sound

EXECUTIVE SUMMARY

“Music is pretty much everything.” Chi

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

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

Music is integral to young people’s lives. It’s young people’s favourite hobby, equal to gaming and ahead of sport, drama, and dance. Young people are listening to more music than ever before⁰¹ and they often listen while doing something else – music is the accompanying soundtrack to their lives. Young people have a diverse range of musical tastes, but genre definitions are becoming redundant as their choice of music is increasingly driven by their mood and state of mind.

Young people are making more music than they were a decade ago⁰². The majority of young people are active music-makers and there are more young people making music than in a previous Youth Music survey conducted in 2006. Digital technology and policy changes have helped to democratise access. The types of activity and the instruments played vary with age and gender and there are increasing numbers of young people taking a DIY approach to music-making.

Music in secondary schools is in decline⁰³, posing risks for young people’s creativity and wellbeing and the future economy. Yet the need for young people to have a comprehensive and relevant music education is becoming more pressing than ever. The economy is changing, and occupations of the future will involve activities that machines are less able to do. Music and the creative arts help young people to develop specific skills and behaviours that will be increasingly important as artificial intelligence increases in future years. There’s an opportunity for music in schools to be re-invigorated and re-imagined, so that it is more relevant and inclusive.

Patterns of engagement differ according to a young person’s background. Those from lower income backgrounds are more likely to see themselves as musical, and are just as likely as others to sing and play an instrument. They’re statistically more likely to be involved

in musical activities that tie in with popular culture such as karaoke, making music on a computer and rapping. But their creative identities often go unrecognised in music education, and they’re less likely to get to more advanced levels of technical ability. This will have an impact on the diversity of the music industry in future years. If music education is to become more inclusive, then it needs to place more emphasis on valuing and nurturing young people’s existing creative identities.

Music is a powerful contributor to wellbeing.

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

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



Photo: Ark T Music Project

ABOUT THE AUTHORS

Youth Music is a national charity investing in music-making projects that help children and young people develop personally and socially as well as musically. We work particularly with those who don’t get to make music because of who they are, where they live, or what they’re going through. Young people take the lead in choosing what and how they want to learn, making music of every style and genre.

Youth Music’s work is funded by the National Lottery via Arts Council England. This enables us to support more than 350 music-making projects each year, reaching 89,000 children and young people aged 0-25. But we know there’s more to do. Right now, we can only invest in about 40% of the projects applying to us for funding. We’re very grateful to People’s Postcode Lottery and the other trusts, foundations, companies and individuals who donate and fundraise to help us provide even more music-making opportunities.

Ipsos MORI is a market and social research company that is passionately curious about people, markets, brands and society. We deliver information and analysis that makes our complex world easier and faster to navigate and inspires our clients to make smarter decisions. We believe that our work is important. Security, Simplicity, Speed and Substance applies to everything we do. Through specialisation, we offer our clients, such as Youth Music, a unique depth of knowledge and expertise. Learning from different experiences gives us perspective and inspires us to boldly call things into question, to be creative. By nurturing a culture of collaboration and curiosity, we attract the highest calibre of people who have the ability and desire to influence and shape the future.

A note on terminology

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

THE VOICE OF THE NEXT GENERATION

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

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

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

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

67% of young people make music

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

30% of young people play an instrument

32% of 16-17 year olds class music as their favourite activity

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

"If I didn't have music ... I feel like I would be a grumpy little bastard!"
Kallum

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

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

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

85% of young singers say singing makes them happy

The average Spotify user streams 40 unique artists per week

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

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

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

71% of 7-10 year old girls regularly sing

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

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

1) MUSIC IS INTEGRAL TO YOUNG PEOPLE'S LIVES

“When I make music, when I play music, I can be myself ... You don't have to worry about what anybody else thinks, it's about you, you can make yourself happy, and be how you want to be.” Finlay

In England, music (alongside gaming) is young people's favourite pastime. It plays a fundamental role in their lives. Two thirds of young people consider themselves to be 'musical', and in a given week, 90% listened to music. 97% of the young people surveyed had interacted with music in some way in the past week.

Consumption channels

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

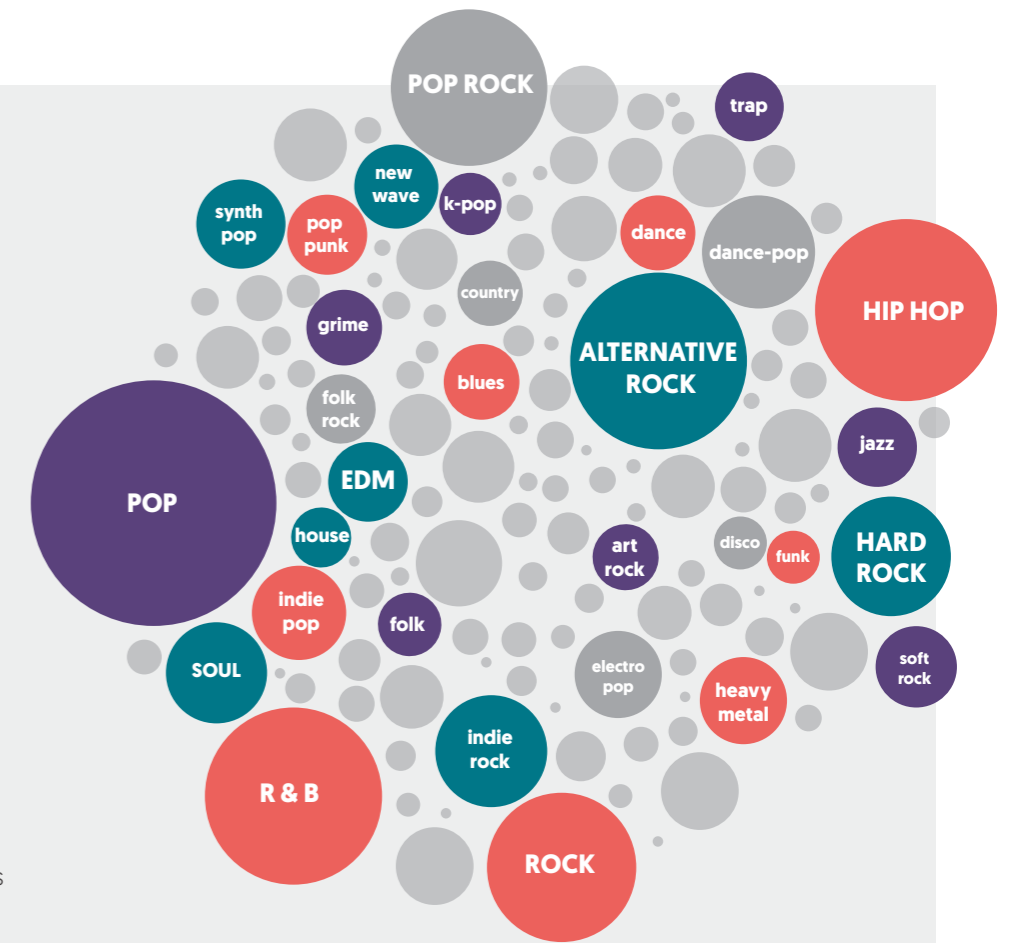
The popularity of radio listening endures, with two-thirds (64%) of young people tuning in each week. A significant 69% of young people have watched a music video in the last week. YouTube is used by 80% of 16-24-year olds⁰⁴ and users in this age range stream up to an average of 487 videos a month⁰⁵. Music was the most searched-for term on the site in 2017⁰⁶.

Live music

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

Genres and artists

Ease of access has led to young people engaging with a diverse range of musical genres. While they overwhelmingly describe pop, rock and hip-hop/rap as their favourite genres of music, the range of young people's tastes is vast. When asked to name their three favourite artists or groups, the most popular responses were inevitably major chart acts – Ed Sheeran, Little Mix and Stormzy – yet overall the 1,001 respondents named 633 different artists spanning more than 300 different genres⁰⁷.



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

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

The diverse and eclectic tapestry of young people's musical tastes evident in our research is echoed by Spotify Insights data, which showed listening diversity increasing by more than 40% over a four-year period from 2014-17⁰⁸. Streaming services give young people more control over their listening habits, and Spotify now has more listeners than Radio 1.⁰⁹ Context is the new genre – the driver for young people's musical choices. They turn to music while they're doing other activities – and their choice of music is defined by the mood they want to create:

“To be honest, I can't go a day without listening to music. I've always got to listen to music. [...] It just, like, gets me in a good mood, like, waking up early in the morning, I straight away just put on music, straight away to like, just get me up in a good mood instead of just coming to

school – like – sometimes I'll just come to school angry for no reason, so it's just good to listen to music.” Dwight

Seven of Spotify's top ten most popular playlists in 2017 were context related, blurring genre boundaries, and three in particular are about creating a positive mood – 'Monday Motivation', 'Feel Good Friday' and 'Get Home Happy'¹⁰. This trend is reflected in new music being made and released:

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

Rebecca Allen, President of Decca Records UK

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



2) YOUNG PEOPLE ARE MAKING MORE MUSIC THAN THEY WERE A DECADE AGO

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

As well as music in schools, the Department for Education's National Plan for Music Education guides England's strategy for music education. It ensures a £75 million annual investment in local Music Education Hubs, supporting young people to learn instruments and take part in ensembles. This funding is further supplemented by Arts Council England's funding portfolio, which includes grants made in excess of £9 million annually by Youth Music, predominantly for out-of-school music-making activities, working with children from their early years into young adulthood. Published data gives a fairly good picture of who is and isn't benefiting from this investment. But this is only one part of the story. In this research, we wanted to get a complete picture of young people's musical lives, including what they do independently, or with friends and family outside more formal channels.

Musical engagement

The most commonly reported music-making activities were singing and playing an instrument. The next most popular activities are karaoke and making music on a computer. Levels of music-making have increased significantly since 2006, when a similar survey conducted by Youth Music found that just 39% of young people reported making music¹¹ on a regular basis. The increase reflects what young people are able to do independently, supported by digital technology.

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

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

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

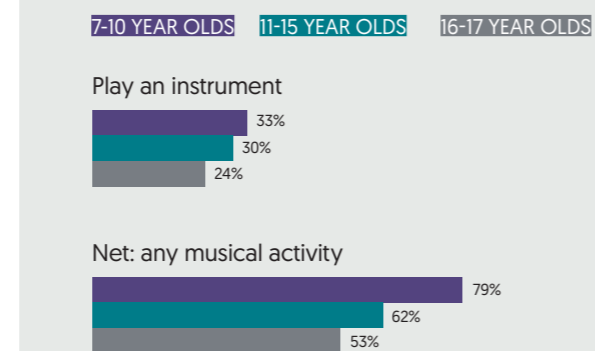
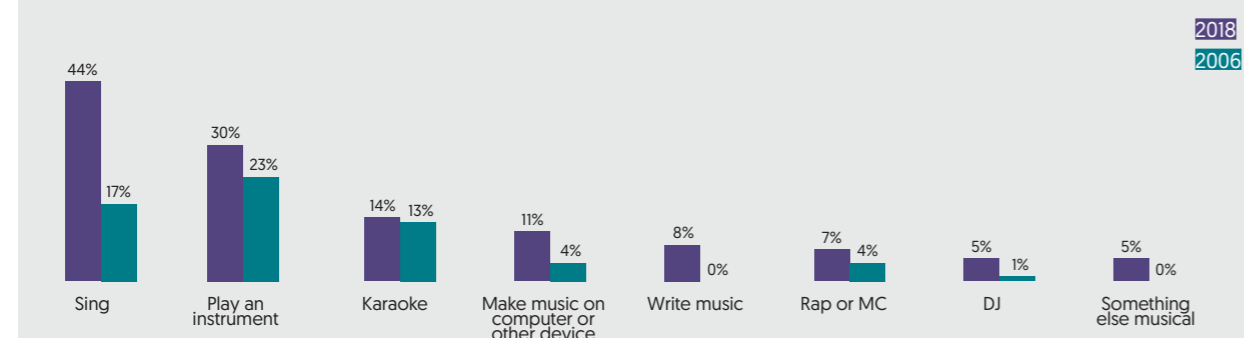


CHART 1 : Please select all of the following which you do (all respondents)



We found that:

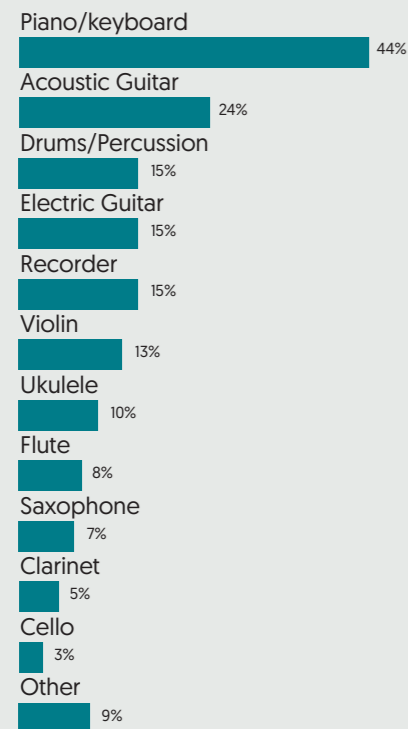
- A third of all 7-10-year-olds say they play an instrument, but only one in four is still playing at the ages of 16-17 – there's also a big gender gap with boys much more likely to stop playing
- The significant decline in instrument-playing for boys as they get older is balanced with a corresponding increase in making music digitally.
- 16-17 year-old young men are twice as likely as young women of the same age to be making music on a computer.
- Singing has a similar drop-off rate with only one in four participating by the ages of 16-17.
- Ukulele, violin and recorder (instruments commonly used in whole class ensemble teaching) all see large

drop-offs between the ages of 7 to 17, whereas the electric guitar increases most significantly in popularity over the same age period.

- The most commonly played instrument – for all ages – was the piano/keyboard, played by 44% of young musicians. Guitar (both acoustic and electric) comes a close second.
- Participation in after-school music clubs peaks among 11-15-year-olds, where 43% participate, but this nearly halves by sixth form age.
- Writing music was the only activity listed that had no obvious age or gender bias.

	7-10 YEAR OLDS		11-15 YEAR OLDS		16-17 YEAR OLDS	
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE
	169	221	219	212	113	67
PLAY AN INSTRUMENT	33%	33%	30%	30%	22%	28%
SING	46%	71%	28%	45%	20%	31%
RAP OR MC	10%	5%	10%	4%	12%	6%
DJ	8%	3%	6%	5%	6%	3%
KARAOKE	16%	22%	6%	14%	10%	16%
WRITE MUSIC	9%	9%	8%	8%	7%	9%
MAKE MUSIC ON COMPUTER OR OTHER DEVICE	7%	6%	16%	12%	19%	9%
SOMETHING ELSE MUSICAL	2%	5%	5%	7%	6%	4%
NET: ANY MUSICAL ACTIVITY	72%	85%	57%	67%	50%	58%
I DON'T DO ANY OF THESE	28%	15%	43%	33%	50%	42%

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



Musical learning

Of those who play an instrument, 77% have had lessons. The largest proportion, just over half (55%), learn in school. Increasingly though, young people are taking a DIY approach with 39% reporting that they are to some extent teaching themselves. This is a significant increase since the 2006 study, when only 16% were guiding their own learning¹².

Guitar players exhibit the most DIY approach to learning their instrument. Electric guitar, acoustic guitar, drums and other percussion players were the instruments most likely to be self-taught – almost half of these players reported teaching themselves. 31% of acoustic guitar players are taught by friends [compared to the next highest piano/keyboard at 20%] and almost one-quarter learn from YouTube or similar, compared to the average of 19% across all instruments.

Music in schools

While independently-led lessons and DIY music education are thriving, other areas of music learning are suffering a decline. GCSE and A Level Music exam entry rates are decreasing annually, and recent research points to a reduction in the music curriculum offer in state secondary schools as a result of the introduction of the Ebacc¹³.

Many of the young musicians we spoke to weren't impressed with the school music curriculum:

“I wanted to do music in school, but it wasn't this type of music [grime], so I never did music in school.” Kallum

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

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

Music and the creative arts promote the development of specific skills, knowledge and behaviours that will be essential for the nation's future economic success. The creative industries are a growth area of the economy: it's estimated that by 2030 the UK could have generated as many as 1 million new creative jobs.¹⁴ Yet it is also predicted that as many as 800 million jobs worldwide could be displaced by automation over the same period of time.¹⁵

Occupations of the future will involve activities that machines are less able to do – things like managing people, applying expertise, and communicating persuasively. While the technical skills required for the world of work will vary depending on career, the 'softer' skills – teamwork, communication, leadership, emotional intelligence – will only grow in importance with the increasing uptake of artificial intelligence. It is imperative therefore that today's generation of young people are given sufficient opportunities to develop their creative and soft skills and are prepared to enter the world of work. We're in the midst of a technological revolution that will create change in the way we live, work and relate to one another. Throughout their schooling, young people should be given opportunities that will give them the best chance of success. We should be in no doubt of the importance of music and the wider arts in helping achieve this.

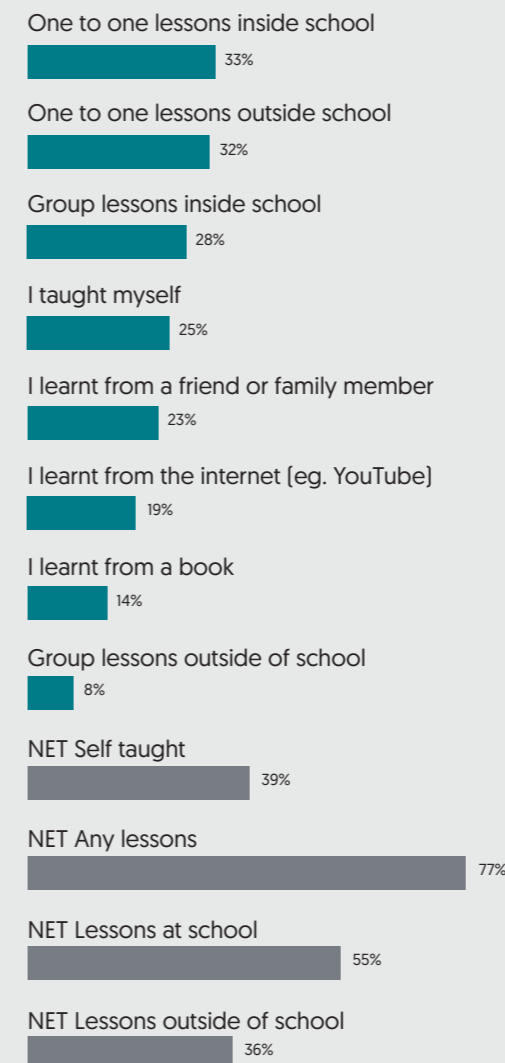
“Any activity that enhances social and emotional contact with other human beings is enormously brain-building... The brain's frontal lobes are responsible for our empathy, our social decoding, our problem-solving, executive-functioning and decision-making. So it's not just about the music itself, it's not about social contact itself, it's actually about building a brain that is well equipped for life.”

Jo Stockdale, Well Within Reach, formerly known as Child Learning & Development Advisory Centre

While the Ebacc looks to be accelerating the current decline in school music¹⁶, it is the continuation of a

downward trend that has been occurring over many years. In fighting for music education in schools, the vital role that music plays in supporting young people's wellbeing – and how musical engagement varies between people from different backgrounds – should be taken into account. It's time to reflect on national musical education in the UK – to capitalise on young people's love of music and their individual musical identities, to be inclusive and promote outcomes beyond attainment, to be more relevant to the creative industries, and to make music an indispensable part of school life.

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





3) PATTERNS OF ENGAGEMENT DIFFER ACCORDING TO A YOUNG PERSON'S BACKGROUND

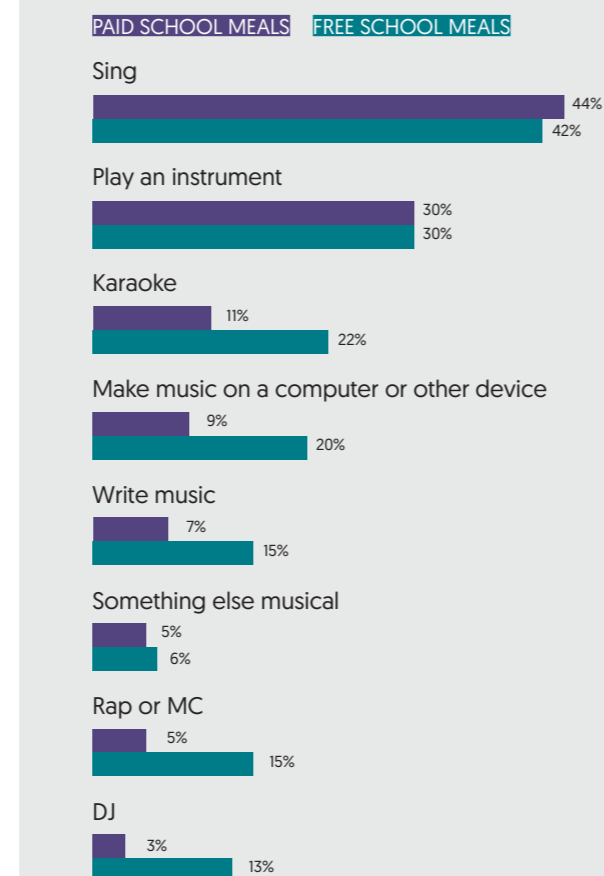
Our research shows that those from lower income backgrounds have quite different patterns of engagement with music than those from higher income backgrounds.

Many young people with limited financial means are experiencing a rich musical childhood – it just looks different to that of their more affluent peers. It's more likely to emanate from their home, have a DIY feel to it and less likely to be taught in a formal way. Often it's 'everyday creativity'¹⁷ – activity which is already happening in people's lives, an accessible form of culture that they can engage in.

Different kinds of engagement

We compared survey results for those who were entitled to free school meals¹⁸ to those who were not. 76% of those

CHART 5 : Please select all of the following which you do. (all respondents)



in receipt of free school meals describe themselves as musical, significantly higher than those who aren't (60%). They're just as likely as other young people to sing and play an instrument, were significantly less likely to have seen music at a concert or gig (50% vs 27%), but twice as likely to have reported seeing live music played at home in the last week (45% vs 21%). They were also significantly more likely to be involved in certain types of musical activity – in particular karaoke, making music on a computer, writing music, DJing and rapping.

The wider evidence base shows that from age 11 onwards, economic background becomes a major barrier to participation in certain forms of music education:

- Just 6% of regular participants in Music Education Hub ensembles and choirs are eligible for the 'pupil premium' (additional funding given to schools to support young people experiencing economic or family difficulties)¹⁹.
- A 2014 ABRSM report found that 74% of young people from the 20% wealthiest backgrounds had received instrumental lessons and were twice as likely to have taken a music exam as those in the lowest 25% income bracket²⁰.

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

“The people who are able to access proper music education from an early enough age – so that they have the potential to go on to become professional musicians or composers – are increasingly being privately educated”

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

Popular culture and DIY music

Making music videos, producing beats and bars on a computer, DJing, rapping and even karaoke are not

activities that have been traditionally been part of formal music education. But young people are engaging in these newer forms of popular culture. Estimated to have over 200 million users worldwide²¹, the TikTok app (formerly Musical.ly) allows the user to create short form (lip-synched) music videos and upload them to other social media channels such as Snapchat and Instagram. While there may not be a lot of music involved, the app encourages young people to be creative, autonomous and hone their performance skills, often in highly humorous ways. It has widespread usage and has featured prominently at the top of the free app charts²² over the last couple of years.

The fact that almost one in five young men say they make music on a computer is reflective of the rise in the number of so-called 'bedroom musicians'. Online resources support young musicians' desire to learn independently. It has never been more affordable for young people to compose their own music through open source software, which can provide them with all the functionality of a professional studio on a computer. It's then possible to release this music independently and start building a musical career.

Bedroom musicianship and karaoke-style apps are part of a suite of activities that develop young people's musical identity but often go unrecognised in formal music education. This is a missed opportunity to engage young people and support them in their musical development. If young people don't have access to professional guidance, they're less likely to have support to progress to more advanced levels of technical competence, to learn from expert role models, to understand the career paths available to them, and to be aware of key legal issues and risks in the music industry.

Music education needs to be reshaped and democratised for an evolving landscape – and it needs to start from young people's existing creative identities and to nurture talent from diverse backgrounds. Not only will this result in higher engagement, but it will also serve to level the playing field, meaning those from less privileged backgrounds are less likely to miss out.

The fact that almost one in five young males say they make music on a computer is reflective of the rise in the number of so-called 'bedroom musicians'

4) MUSIC IS A POWERFUL CONTRIBUTOR TO YOUNG PEOPLE'S WELLBEING

The wellbeing of young people in the UK is increasingly under the spotlight and of growing concern. Over the last five years, 90% of school leaders reported an increase in the number of students experiencing anxiety or stress, and low mood and depression²³ and an estimated three children in every 20 have a diagnosable mental health problem²⁴. Anxiety, in particular, is on the rise among young people²⁵, as their wellbeing is influenced significantly by curriculum changes, exam pressures²⁶ and technological and social change. Social media use has been linked to "lower subjective wellbeing in relation to family, appearance, school, school work and life as a whole"²⁷.

Research shows that music has a positive impact on wellbeing²⁸. It enables young people to connect with their peers, their community, their family and their roots. Making music as a group physically brings people together, encouraging teamwork, empathy and social bonding. It makes a positive contribution to young people's subjective wellbeing – a positive state of mind where they feel good about their life, and its constituent parts (such as their relationships with others and how they see themselves). Subjective wellbeing can be assessed by measuring mental states including anxiety, happiness, life satisfaction, meaning, sadness, stress and worthwhileness.

Listening to music and positive emotional states

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

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

Well-aware of how music affects their emotions, young people are drawing on it as a tool to support their wellbeing. They're DJs carefully curating the soundtracks to their lives. Just as a composer would write a musical score for a film, young people are using music to convey and reflect their feelings, to change their emotional state, and to regulate their mood²⁹.

The choice of song and genre is an important mechanism in creating the right emotional state. While some young

people told us they would turn to happy or upbeat music when they're feeling down, others said it was important that the music matched their mood.

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

Wider qualitative research has shown that young people choose different genres of music for different moods, but that they often like to be "mood-congruent"³⁰ – that is, to listen to music that reflects how they're feeling. This is because exploring the feelings and sensations created by music can help give "form to different feelings"³¹, making them more comprehensible.

Making music has greater impact than listening to it

Research suggests that the creative process of *making* music has a deeper and more profound impact than listening to it³². The young people we spoke to substantiated this, seeing music-making as a vital part of their lives and something which made them feel worthwhile:

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

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

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

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

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

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

There is significant research demonstrating the power of music in improving mood and aiding in the treatment of health issues. Music-making has been shown to diminish anxiety, stress and self-harm; and to increase communication and coping strategies for young people in child and adolescent mental health settings³³. Singing in particular has been shown to improve mood and increase relaxation³⁴ – which was corroborated by some of our interviewees:

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

"When I'm singing I feel happy." Fabrice

Music to combat loneliness

Young people are more likely than any other generation to be lonely, with 10% of people aged 16 to 24 identifying as 'always or often' lonely, three times higher than people aged 65 and over.³⁵ Indeed, a high percentage of young people in our research reported that they felt lonely. Those who made music in the last week, however, were less likely to say they 'often feel lonely'.

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

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

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

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

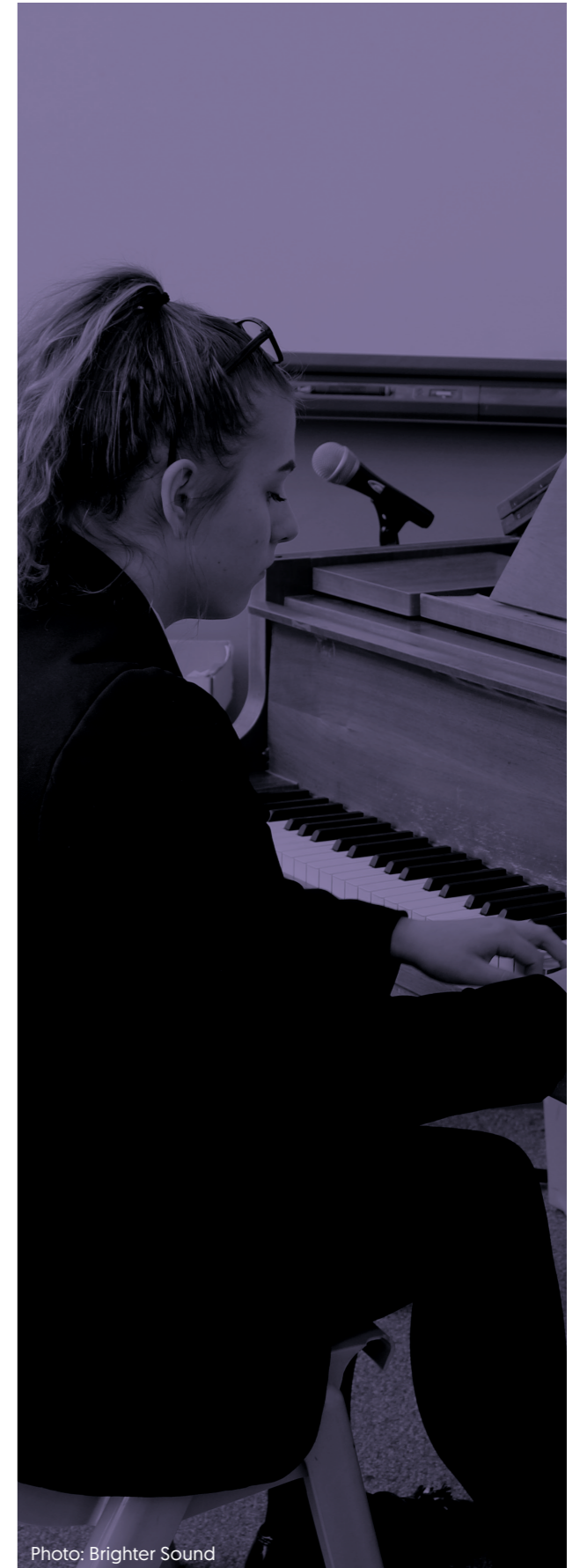


Photo: Brighter Sound

“I guess when we used to see each other at school, we’d be ‘oh, she goes to our youth group’ but now it’s ‘that’s our friend’, so it’s actually brought us closer as a whole group of people.” Shelby

Regular participation in group musical activities can strengthen social cohesion by increasing empathy³⁶ and co-operative behaviour³⁷. Making music in groups has wider social value – besides the development of individual friendships – by providing ‘opportunities to communicate and connect with other people’³⁸ and a sense of belonging:

“Making music with other people is related to some deeply-based instincts, we have an instinct for moving together and consolidating the ‘in’ group. So, thinking back to when we were tribes; we have a sense of belonging and we feel part of that group.”

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

Young people’s view of their future

“I don’t think we can underestimate the importance of nurturing every child’s ability to believe they have a choice and that they have power over their own circumstances.”

Jo Stockdale, Well Within Reach, formerly known as Child Learning & Development Advisory Centre

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

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

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



Photo: Stratford Circus – New Young Voices Collective

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

More young people from all backgrounds are making music, and the music industry – after adapting to new technologies and changing listening habits – is a growing area of the UK economy. It’s a future source of jobs for today’s young music makers. In 2016, the music industry contributed £4.4 billion to the economy – up 6% on the previous 12 months, with exports across the whole sector rising by 13% to £2.5 billion³⁹. The wider UK music industry was responsible for the employment of 142,200 people in 2017.⁴⁰

But there is a gap that exists between music education and the music industry, meaning that young people often aren’t aware of the opportunities available, or the paths they need to follow to pursue a musical career⁴¹. This is limiting the size of the talent pool and may be hampering the country’s future competitiveness. There is a real opportunity for the industry and education sectors to join up to provide more inclusive pathways to success, both for artists and those working behind the scenes.

Getting a job in the music industry

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

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

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

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

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

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

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

Fifty-five percent of respondents to Youth Music’s 2017 Stakeholder Survey⁴² echoed these concerns, saying that they felt the music industry wasn’t doing enough to open up progression routes into work. They called for young people to have more access to venues and equipment, performance and promotion opportunities, professional mentoring and work experience.

Diversifying the music industry

Due to systemic biases⁴³ and the concentration of jobs in the capital, the demographics of those currently working in the music and the wider creative industries are not representative of the population as a whole⁴⁴. This is exacerbated by the continued practice of unpaid internships to gain entry-level employment. Whilst we know many of the largest employers do offer paid internships, recent research found that 86% of internships across the arts industry were unpaid⁴⁴. According to UK Music’s 2016 workforce diversity survey:

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

While the UK Music survey doesn’t measure social class, a separate creative industries survey found that over a third of the creative workforce in the capital are from upper-middle class origins, compared to 23% in the rest of the UK.⁴⁵

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



Photo: London Symphony Orchestra

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

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

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

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

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

Rebecca Allen, President of Decca Records UK

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

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

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

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

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

A win-win for education and industry

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

The music industry is concerned about its diversity and the talent pipeline of tomorrow.⁴⁶ At the same time, there are plenty of children and young people from diverse backgrounds making music. Aside from a few time-limited

projects, the industry and education sectors have failed to join up their talent development strategies at a national level. Work has started⁴⁷ but this now needs to move beyond the rhetoric to concerted action.

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

6) MUSIC HAS THE POWER TO MAKE CHANGE FOR THE NEXT GENERATION

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

Policy-makers

- The government should continue to recognise the wide-ranging benefits that a rich and diverse music education brings – for young people, for wider society, and for the economy – and the level of state investment should reflect this.
- The growth of music and creative industry

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

opportunities outside London should be encouraged by funders and policy-makers, ensuring investment is more equitably spread in future years and aligned to local and regional economic and cultural policies.

- With increasingly tight budgets, the remit for public music education funds should be targeted towards those who face greatest barriers to access, and with a focus on outcomes and quality.
- Those involved in supporting young people’s wellbeing should give greater consideration to the role that music can play, and how young people’s passion for listening to music and their everyday creative lives can be interwoven with wider strategies to support good mental health.

Music education

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

Music industry

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



APPENDICES

Methodology

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

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

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

The young musicians

Chi,
Ark T Music Project, Oxford

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

Fabrice*,
Northumberland, Tyne and Wear
NHS Foundation Trust, Newcastle

Fabrice*, 18, took part in the 'Singing for Health' project run by Northumberland, Tyne and Wear NHS Foundation Trust. He grew up in central Africa and has been in England since 2014. He experienced some quite serious mental health problems which led to him spending time in hospital last year, where he was introduced to the project.

Hannah,
WILD Young Parents Project, Bodmin

Hannah, 19, is a mum to 10-month-old Lilly. She takes part in the 'Music Makes Me Happy' project for young parents and their young children, run by WILD Young Parents in Cornwall. The weekly music-making sessions include ukulele, singing and Makaton (a sign language that can be used alongside speech to help with children's language learning). The project has helped Hannah bond with her daughter and find a supportive group of friends.

Shelby, Phoebe, Kylie and Shona,
My Pockets, Hull

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

Dwight, Charlotte and Finlay,
Brighter Sound, Manchester

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

Leah,
Pedestrian, Corby

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

Taz and Kallum,
Romsey Mill, Cambridge

Taz (17) has been taking part in projects run by Romsey Mill for three years. She is also at college studying Psychology, Sociology and Criminology.

Kallum (24) has been taking part in projects run by Romsey Mill for about ten years. He is now beginning to take on some additional responsibilities as a music leader with younger participants.

Filip,
Gem Arts, Newcastle

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

The expert interviewees

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

Professor Sue Hallam

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

Jo Stockdale

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

Vick Bain

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

Rebecca Allen

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

*name changed

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