

## **INTRODUCTION**

**Jeunesses Musicales International** is the world's largest youth and music network, with over 30.000 diverse music events held each year in 41 member countries worldwide (including 27 European), and reaching a total audience of over almost six million people. Common to these multiple musical meetings points for young musicians and listeners, is the belief that music is a powerful force that can positively affect our lives and for 60 years. JMI has enabled young people to develop through music across all boundaries.

**ExTEND 2004** - Experimental Transnational European Network Development is a significant initiative launched by Jeunesses Musicales International. It aimed to strengthen the youth and music network in Europe, by creating a pan-European platform that will ensure the exchange of knowledge and practices between music organizations. The project was largely funded by the EU DG Culture and Education, as part of the Culture 2000 pilot programs. The Project involved a substantial consultation process among music organizations in Europe, through a series of workshops and conferences that took place between April and December 2004, which aimed to exchange information and increase the cooperation between local, national and European music operators, and ensure professionalism, training and transfer of know-how between them.

In order to lay the foundations of the European network, JM International conducted a survey on youth and music in Europe, formatted as a social assessment of the basic trends among the young listeners and musicians and the music operators in at the beginning 27 targeted countries in Europe.

As part of the overall ExTEND aims and objectives, the main intention when designing this assessment was to explore the needs, the interests and the practices of young listeners and young musicians, define current trends as well as the priorities of music operators and educators, all together in the field of music and in the context of their socio-cultural environment. Another important aspect, which serves the needs of the project in general, is to assess how and in what ways the development of music culture among young people represents a powerful tool that fosters intercultural processes in Europe. The raw results of this research have been presented to the JM sections and other music organizations on

European level at the ExTEND Concluding Conference in December 2004 in Brussels, Belgium, in order to receive substantial feedback for the design of the final report.

### ***Acknowledgements***

It was mostly the national JM sections and other partner organizations in the countries where such sections do not exist that conducted the questionnaires on local level (the field work). The research team would hereby like to offer its extended gratitude to their work, dedication and trust invested during the process.

Finally, we would like to thank Jeunesses Musicales Macedonia for the technical assistance and the logistics provided for the duration of the entire assignment, as well as for their dedicated work entering the data into the statistical package.

Our gratitude goes also to the participants of the several workshops and conferences organized during 2004, for their inputs and dedicated work: the ExTEND Research Workshop organized during the 'ExTEND Visions: Music for Europe' Conference in Brussels, Belgium in December 2004, the 'ExTEND AudiencesAwarenessAction' Workshop held in Vienna, Austria in October 2004, the SEE ExTEND Workshop organized in Struga, Macedonia in September 2004, the Communication and Networking Workshops in Ljubliana, Slovenia in August 2004, and finally the ExTEND Conference held in Barcelona, Spain in June 2004 as well as several additional workshops and events such as the Annual General Assembly of JMI held in Groznjan in August 2004, 'Kunstschooldag' in April 2004 in Amsterdam, Netherlands, 'Musik Direkt' in May 2004 in Halmstad, Sweden and finally the Capacity Building Workshop in Blantyre, Malawi in October 2004.

Furthermore, the team would like to thank the JMI office in Brussels for the logistical support provided as well as for their input in the design of the questionnaires, their support and comments given during the production of this report.



## **MAIN OBJECTIVES OF THE RESEARCH**

The main objective of the survey was to map the situation in the field of youth and music on European level, through an overall scanning of the basic trends among young people, young musicians and music operators: as a side-objective, the assessment also analyzed the current capacities of the music operators. Finally, it should serve as a framework that will enable the main stakeholders in the music field to get insight into the national and local perceptions on youth and music.

In particular, the survey:

- Assessed the needs, interests, experiences, and attitudes of young people on music as a part of the culture of the contemporary life;
- Defined the ways through which music culture helps in overcoming cultural differences between nations and acts as a tool for improving transnational cultural cooperation;
- Investigated the possible ways by which music can bring together different European cultural entities (what kind of music will be most appropriate for young people to understand each other despite social and cultural differences, if possible?);
- Investigated the possibilities for the mobility of young people and young musicians in Europe as a natural manner of exchanging experiences, building new cultural identities, sharing opinions, attitudes, tastes, etc.
- Assessed the attitudes of young people on contemporary societal and cultural processes through their attitudes on music as a very important part of their lives.
- Assessed their attitudes on the role, the main objectives and the functioning of the music institutions and organizations that are supposed to promote young musicians and music culture in general;

- Found out how music organizations and institutions can approach young people and help them to be self-confident, creative, critical, and encourage attitude toward the possibilities of changing the world;
- Evaluated the role of music and music culture as a way of living for young people: as a life orientation, as a life style and as a way of thinking;
- Evaluated the impact on the development of youth's social and cultural values; how they are involved in contemporary social processes: does music and music culture enable young people to be creative, critical, active, and disobedient toward contemporary, not only national, but also regional and global social and cultural phenomena?


As mentioned in the introduction, this survey was conducted on the level of a social assessment that means an overall “scanning” of the societal and cultural phenomena that it refers to. It is a kind of survey that aims to find out the main trends that can be used as a reference point when building general strategies and policies.

A wider scientific research is usually conducted through various methodological instruments like: questionnaires, interviews, observations, etc. However, such wider research methodologies require substantial material and human resources (both from a financial and expertise point of view), as well as substantial time for the field work and the analysis of the data. Given the ExTEND framework and time-bound deliverables, in the case of our survey, our only possibility was to use pre-designed closed questionnaires and a limited number of units according to the sample. This is the reason why the questionnaires had to be designed carefully with many questions structured in different blocks so that one can provide the necessary data (information) on the problems tackled by the research.

The data were processed and analyzed with SPSS (Statistical Package for Social Sciences).

The document that you have in front of you represents the summary of the main points explored during the survey: it offers the basic analysis of the data with the required explanations on issues (and terminology!): it gives the opinion of young listeners, young

musicians and music operators on issues that have been jointly explored in both of the questionnaires, providing us with information on basic trends, synergy points but also mapping the basic differences among the participants of the survey.



## **THE STRUCTURE OF THE QUESTIONNAIRES**

### ***A. Music operators***

In the questionnaire targeting music operators we explored several different issues about the way music operators function (main objectives, scope of work, target groups, type of organizations, mutual relations and networking), their relation with the target groups (outreach and demand-driven activities, assessment of needs and interests, organizational culture and membership), their interaction with European structures, as well as their development needs. The Questionnaire had the following structure:


- Introductory text about the project;
- The pollsters name and coordinates the place and time of the interview and comments by the pollster;
- Statistical data related to the organizations;
- Organizational and project development;
- Audience outreach;
- Demand driven activities and interests of young people;
- Support for, and promotion of young musicians;
- Intercultural learning and music organizations;
- Music as a tool for development.
- Comments by the respondents.

### ***B. Young listeners – young musicians***

Under the term young musicians we mean the musicians who are formal music education graduates, students in the formal music education system and musicians who never attended or dropped out of formal music schools (amateur musicians).

The second Questionnaire aimed to map the current trends among young listeners and young musicians towards music in general, but including their attitudes towards the music education and the music sector, their preferences in the music field, their relation with and their opinion about the work of the different stakeholders in the music field, their awareness about multicultural issues and the role of the music in society. The

Questionnaire had two parts, the first part for young listeners, and the second part for young musicians only. The young musicians were required to answer both parts of the instrument. Thus the Questionnaire was structured as follows:

- Introductory text about the project;
  - The pollsters name and coordinates, and place and time of the interview and comments by the pollster;
  - General information on the respondents background;
  - Music education and talent promotion;
  - Standard of living: employment and income generation;
  - Music preferences: young people as consumers;
  - Multiculturalism and young people;
  - Music as a tool for development;
  - Response to needs;
  - Questions to be filled only by musicians;
  - Comments by the respondents.
- 

## **THE RESEARCH SAMPLE**

### ***What type of sample was used during the survey?***

This survey was not in a position to use the so-called “random sample” - it required prior in-depth investigation of the basic statistical information related to young people in all 27 countries, including prior knowledge of statistical data about the percentage of young people in the total population; the percentage of musicians in the total number of young people, for example, in order to determine the minimum standard number of respondents per country. In such a case, we would have required at least 2.000 respondents per smallest country! Therefore, we used the so-called "**non-random structured sample**" in which we predefined the sample's structure (how many young people, how many musicians etc.) according to the special needs of the target group that ExtEND aimed to address.

The sample predetermined that the units to be interviewed, both individuals and operators were to be outreached through the already established contacts and cooperation of the national pollsters (e.g. the national research teams identified through the JM sections and other partner organizations).

### ***Where was the survey conducted?***

The units were identified in the capital cities of the 27 countries part of the research or in other major centers, in cases where the national JM section or the research organization is not based in the capital city, or in case an insufficient number of music organizations are located in the capital.

### ***The targeted number of units / respondents per country***

The methodological sample was based on 2.160 responses, e.g. 80 responses from young listeners and young musicians on national level, as well as on at least 440 responses from music operators from all 27 European countries.

### ***Young listeners / young musicians***

It means that in each country we aimed to ask for the opinion of 80 units (individuals), e.g. maximum 50 young listeners and minimum 30 young musicians.

This proportion does not respond to the actual proportion between young people and young musicians in the reality of each country, but it served the aims of the project. It is common in research to increase the percentage of those categories of interviewers which in reality have a low representation, like the young musicians are in the overall number of youth in the country: in that way we can measure their opinions with a relevant number of respondents per country.

The local pollsters had a task to identify the respondents between two age groups: 15-19 and 20-24 years of age.

#### ***Young listeners***

The structure of the respondents among young listeners was designed as follows:

- 20 young people aged 15-19 in high schools;
- 20 young people aged 20-24 in universities (including postgraduates); and
- 10 young people who are not at school / university and they could be either employed or unemployed (can be in both age groups 15-19 and 20-24);

The research also took into account the different scientific profiles and disciplines among the university students, e.g. social, technical, natural sciences, arts and humanities etc.

#### ***Young musicians***

The local pollsters were instructed to take the opinion of 30 young musicians, dividing them in the following way:

- 10 young musicians aged 15-19 (studying for professional music career music or “amateur” musicians);
- 10 young musicians aged 20-24 (studying for professional music career music or “amateur” musicians);

- 10 young musicians (professionals or “amateur” musicians) who are currently employed (full-time, part-time, or freelance in the field of their acquired education).

The local pollsters were also instructed to ensure that there were approximate proportions of young musicians from classical, pop, rock, jazz and traditional music.

### ***Special considerations***

The local pollsters were asked to ensure the following:

- Proportional involvement of male and female (gender balance), e.g. 25 + 25 in the case of young people and 15 + 15 in the case of young musicians;
- Proportional involvement of both age groups;
- Proportional involvement of all educational levels (see explanation in next chapter);
- Proportional involvement of all ethnic groups in the country;
- In the countries where the division between private and public schools exists, there should be proportional representation of students from private and public schools.

### ***Music operators***

The following criteria were taken into consideration when drafting the list of potential organizations – respondents on national level:

1. The importance of the organization for the overall cultural development;
2. The local, regional and national character of the organization;
3. Profit / non-profit or Private / public or non-governmental / governmental organization;
4. Organizations that work with young people and have programs for young people / with young musicians and have programs for young musicians;
5. Policy makers;
6. Governmental subsidy level;

Using the size (in population) of the countries, the local pollster had a task to ensure that the following number of organizations was interviewed per country:

- **13 Million or more inhabitants of the country** (20 respondents);
- **Between 3 Million – 12.999,999 inhabitants of the country** (15 respondents);
- **Bellow 2.999,999 inhabitants of the country** (10 respondents)<sup>1</sup>.

The sample also predetermined the so-called *ideal distribution* of the targeted institutions in order to include:

- The Jeunesses Musicales section (mandatory if applicable); otherwise another youth music non-profit organization; in case the JM section is not based in the capital, it can be a JM local section or another youth music organization with seat in the capital;
- Music Institutions - Opera or concert hall or orchestra (1)
- Governmental organizations (Ministry of Culture and Education, Youth or Music departments, for example, art councils, cultural councils etc.(1);
- For-profit concert organization, music management agency (1);
- Foundation (public or private) (1);
- Professional music association (1);
- Educational institutions, e.g. Conservatoires, Music schools or Music high schools (2); and
- Music production organization (Record Company, Music Magazine) (1).



---

<sup>1</sup> Austria 20, Belgium 15, Bulgaria 20, Croatia 10, Denmark 15, Estonia 15, France 20, Germany 20, Greece 20, Hungary 20, Ireland 15, Italy 20, Luxembourg 10, Macedonia 10, Malta 10, Netherlands 20, Norway 15, Poland 20, Portugal 20, Russia 20, Slovenia 10, Spain 20, Sweden 15, Serbia and Monte Negro 10, United Kingdom 20, Ukraine 20,

## OVERALL STATISTICS

The researchers obtained the following data from the fieldwork:

### *Young listeners and young musicians*

26 out of 27 countries participated in the research: out of which 20 are fully eligible for further country by country analysis, three can qualify for such national level survey but the scientific output of the received data are questionable, while the data from three further countries can not be used for individual analysis without further field interviews:

Macedonia (74)<sup>2</sup>; Croatia (66); Ireland (40); Great Britain (72); France (12); Serbia and Montenegro (76); Spain (37); Sweden (63); Bulgaria (80); Portugal (28); Norway (6); Greece (80); Russia (74); Ukraine (79); Cyprus (58); Belgium (26); Holland (54); Poland (87); Slovenia (84); Germany (80); Italy (77); Estonia (81); Malta (42); Denmark (7); Austria (34); Luxemburg (80).

Young listeners and young musicians from the following cities were interviewed:

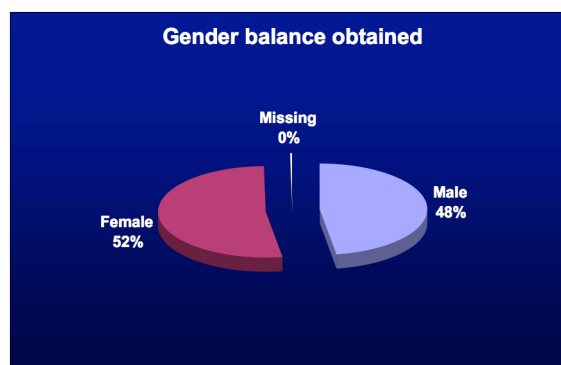
Athens, Barcelona, Belfast, Copenhagen, Belgrade, Berlin, Brussels, Den Hague, Kiev, Kranj, Lisbon, Ljubljana, London, Luxemburg, Malta, Moscow, Nicosia, Oslo, Paris, Roma, Skopje, Sofia, Stockholm, Tallin, Vienna, Warsaw, Zagreb.

The response level is 69% (1497) collected questionnaires out of the targeted 2.160 in 27 countries. Notwithstanding the deeper analysis on national level, the results obtained from all 26 countries that participated have been analysed as part of the overall findings on European level.

---

### *Gender balance*

In overall, good gender balance was maintained by the local pollsters: approximately 712 male and 780 female were interviewed, while 5 units did not respond on this question.

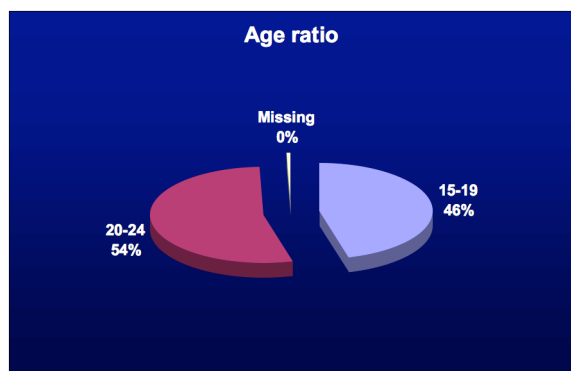


---

<sup>2</sup> Number of respondents on brackets.

### Age ratio

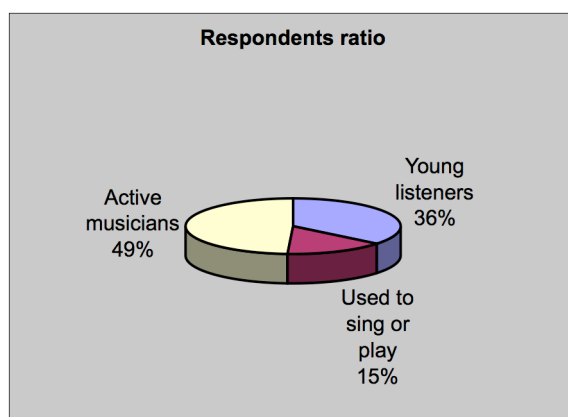
In total, 686 respondents aged 15-19 and approximately 804 respondents aged 20-24 were



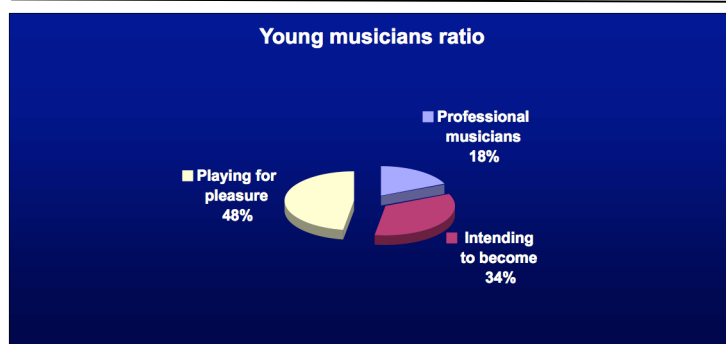
interviewed on national level in 26 countries. Overall, a good balance was maintained although there is a somewhat higher number of 20-24 year olds.

### Respondents ratio

The predefined ratio of 50:30 (or 1.6:1 index) among young listeners (including the ones who once used to sing or play) and young musicians (sing or play instruments) was not maintained during the field work.



However, there is a significantly good overall balance of 49% to 51% between active young musicians and young listeners (including young people who used to sing or play an instrument in the past). Such a ratio (1:1) can also tell us that the music organizations who carried out the field work have a predominantly good outreach among the active young musicians and the ones who used to sing or play an instrument, but significantly less among young listeners in general.



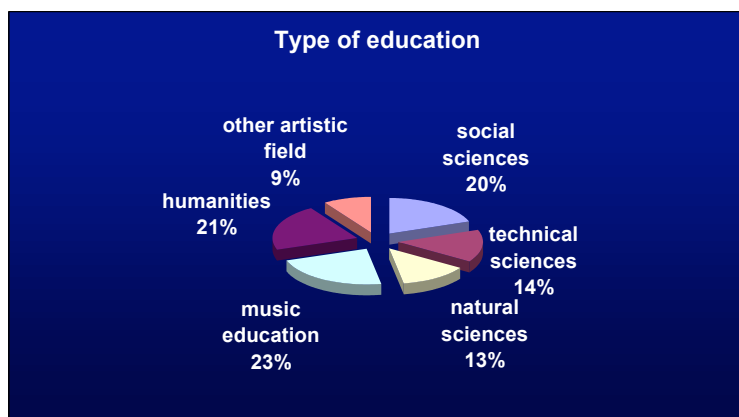
### Young musicians ratio

From the 49% active young musicians, 18% are professional musicians, 34% are still studying (intending to become), while 48% are

playing for their own pleasure (e.g. the self-taught, amateur musicians).

### ***Type of education***

Of the young musicians and listeners still in the education system, the fieldwork outreached a fairly good level of students and high school students in 5 different educational areas, some overlapping as a result of the different education systems that require further in-depth break-down, cultural differences that exist among the countries, as well as because of the parallel studies undertaken by some of the respondents: 320 in



social sciences; 237 technical sciences; 215 in natural sciences; music education 369; humanities 347; and other artistic fields 148.

---

### ***Level of education***

Related to the current level of education of the respondents, in overall, wereceived 43,7% responses from university students, 42,3% from high school students and the rest from other educational levels.

### ***Music operators***

The data on the ratio of the music operators obtained during the survey are the following:

### ***Country ratio***

The total number of interviewed music operators and institutions is 265 units: the total number of targeted music operators throughout Europe was 440, thus the response level of the music operators is 60%:

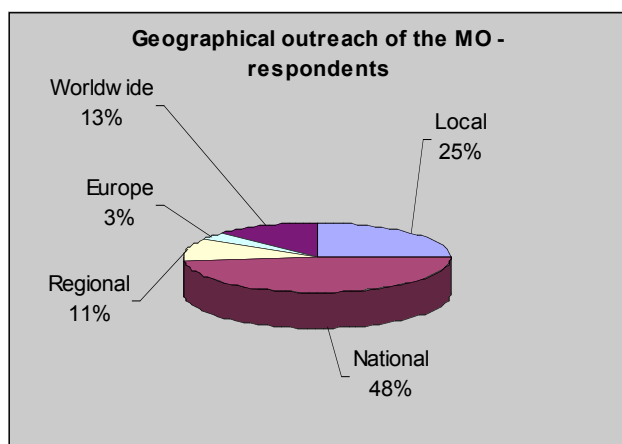
Macedonia (8); Croatia (9); Ireland (8); Great Britain (2); France (15); Serbia and Montenegro (10); Spain (10); Sweden (4); Portugal (9); Norway (10); Greece (12); Russia (11); Ukraine (20); Cyprus (7); Belgium (7); Holland (21); Poland (20); Slovenia (7);

Germany (15); Italy (11); Estonia (16); Hungary (4); Malta (3); Denmark (6) Austria (10); Luxemburg (10).

The responses came from 26 countries in total, out of 27 targeted by the research, however the results from 4 countries cannot be used for further in-depth analysis on national level. Yet the results from all countries were used when collecting the required information and mapping the situation on European level.

The music operators were located in the following cities:

Alcala, Alphen Adrin, Amersfoort, Amsterdam, Antwerpen, Athens, Avignon, Barcelona, Beograd, Bergen, Berlin, Bevenyt, Bonn, Bormla, Brugge, Budapest, Camba la Ville, Cernigov, Ciutadela, Cleon, Copenhagen, Deinze, Den Haag, Dublin, Frankfurt, Galway, Granada, Grodzise Maz, Harkov, Innsbruck, Joneck, Kebenham, Kielce, Kiev, Kirovograd, Kjeller, Laval cedex, Ligniete, Limassol, Limerick, Limmen, Linz, Lisbon, Ljubljana, London, Luransk, Luxemburg, Madrid, Mainz, Mannheim, Menen, Mielan, Migomir, Milano, Munich, Modena, Mont Pellier, Nantes, Nice, Nicosia, Nijmegen, Niort, Odesa, Oslo, Paris, Piacenza, Pontra Mousson, Potava, Regemburg, Rellnigen, Remscheid, S. Guiliano Milanese, s. Simferonolo, Samara, Skopje, St. Brioul, Stavanoer, Stockholm, Stuttgart, Tallinin, Tartu, Tatxien, Toljati, Trondheim, Unegorod, Valbw, Vasteris, Vienna, Vigo, Warsaw, Wevelgem, Wroclaw, Zagreb



### ***Geographical outreach***

If we consider the geographical outreach as the primary criteria for getting a general overview of the respondents, there is a good balance among the music operators; 48% are operate on national level while 25% on local; 11% are active on regional, 3% on European and 13% on

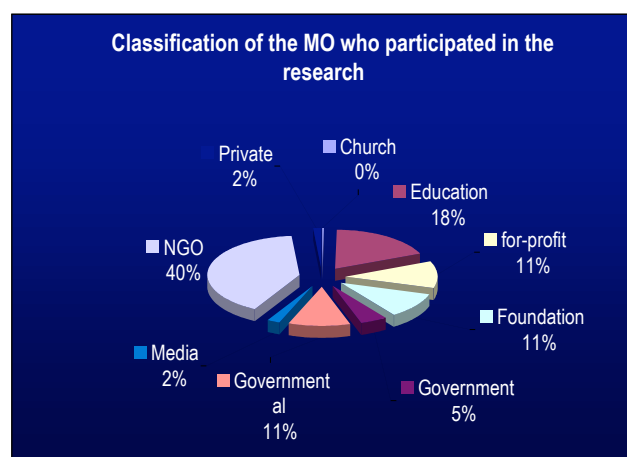
worldwide level.

It is worth to mention that many organizations work on several levels thus we can find national operators which have both local and European outreach: or local organizations

that organize worldwide projects, thus reaching not only musicians but also audiences from all over the world, etc. We found this extremely important when cross-tabulating the geographical coverage with the collected data.

### ***Type of organization***

According to the type of the organization (pre-defined by law and according to the statutes of the organizations), we received responses from non-governmental (non-profit) music



operators, followed by governmental institutions (state orchestras, operas, ministries and other institutes), then educational institutions (universities, high schools etc.), foundations (both private and public); media, private organizations and one religious organization (church)<sup>3</sup>.

It is important that we mention that under the term “government” we are referring to the governmental structures such as Ministries, art councils, agencies etc. Under the term “governmental” we are referring to all public institutions in the music field that are directly funded by the Government, are part of the national cultural policy’s priority institutions and whose funding policy directly depends on the Ministries of culture or similar bodies (Governmental etc.).



<sup>3</sup> Church (1); Education (48); for-profit (30); Foundation (28); Governmental (41, out of which 12 ministries, local authorities or state entities and 29 public or governmental institutions); Media (6); NGO (107); Private (4)

## **CONSLUSIONS**

Given the above mentioned ratios related to age, gender, education, national and cultural background of the respondents as well as their music background (musicians and non-musicians / audience), we believe that the following report will be representative from the point of view of the data obtained during the interviews.

It is extremely important to underline that most of the questions asked relate to the attitudes of the respondents e.g. their estimated opinion on music and youth in general, mapping the most important trends among young people, not just of the respondents themselves and their respective personal stands regarding the questions asked. For example, we are not asking what young people would choose as their personal preference regarding the type of their education, but rather to give their estimate on the general tendencies among the youth population versus the preferred type of education.

Although there is room for a certain level of subjectivity in giving such general answers by the respondents, the questions were asked in a way that enables young people to explore the shared attitudes among youth in general, not just their personal opinion (peer-to-peer). The very nature of the questionnaire provides for this type of personal attitude towards the general trends of the young people.

## I. EDUCATION AND TALENTS

### A. Education

One of the biggest constraints and difficulties encountered by the research was the existence of a variety of formal education systems, which also influences the respective music education system. The education systems are completely different from country to country. JMI provided the research team with analysis and basic structure of all educational systems in the targeted 27 countries that made it easier to compare data and analyze the current trends among young people.

#### *Some definitions ...*

**Formal education** is normally understood as a hierarchically structured, chronologically graded educational system usually provided or subsidised by the state, which runs from primary school levels to secondary education, and from there to higher education institutions. Therefore, formal education is always hierarchical in nature and is based on certain qualifications or degrees.

**Non-formal education** is defined as *organized and semi-organized educational activities operating outside the structure and routines of the formal education system*. This view emphasises the way in which education is delivered, and is formulated in terms of two criteria. One criterion is concerned with ‘organization’ and the other with the ‘relationship to the schools system’. In order to be non-formal, a program or activity has to have a component that includes the intention to educate, that is to achieve some predetermined goals that can be assessed or at least discussed afterwards, using some reliable criteria. If this intention is missing and the educational purposes are not spelled out, then we do not refer to non-formal education here but rather to informal or incidental education<sup>4</sup>.

---

<sup>4</sup> **Informal education**, refers to a lifelong process whereby we all acquire attitudes, values, skills and knowledge from everyday experiences, such as family and friends, work and hobbies, mass media and libraries. That is why informal learning is based on experience acquisition and thus non-institutional by its very nature.

### **Formal and non-formal education opportunities – level of information**

47% of the young listeners are partly and 30,6% fully informed about the possibilities that are offered by formal music education. In general, there is a good level of information related to formal music education.

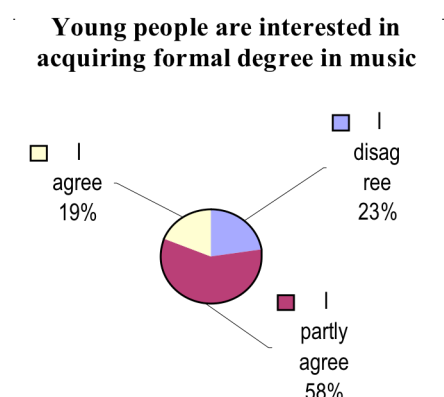
Respectively, 49% of the young listeners are partly informed about existing types of non-formal music education and 20 % fully informed. In general there is a good level of information related to non-formal music education. Still, a relatively high percentage of 30% have stated that they are not informed about such possibilities.

Taking into consideration the importance that such opportunities mean for the acquirement of general or professional music skills among young people, it is extremely important that they are well informed of such possibilities.

In the non-formal education field we have a higher level of non-information among the young people. Bearing in mind that music NGOs are the main pillar for the implementation of non-formal activities in the music field, there is an immediate need for them to increase their outreach in order to create equal opportunities for all young people (information dissemination activities).

Compared to the way information is relayed to young people and the channels they use to get information, there is still a need for improvement by the music operators (especially since the majority of young people is partly informed of both formal and non-formal education!), by exploring and choosing the right and appropriate communication channels to further improve the quality of information delivered to young people.

### **Acquiring a formal degree in music / broadening music knowledge**



In total, about 77% of the young listeners are interested in getting a formal degree in music, with only 23% disagreeing. There is a small prevalence in percentages that shows that young listeners aged 20-24 are more interested in music education than the ones aged 15-19. There is also a small prevalence in percentages that shows that girls are more interested in formal music education than their male peers. The

lowest interest in formal music education exists among young listeners in France followed by Luxembourg and Poland, while high level of interest exists in the Balkan countries and Eastern Europe.

In total, some 90% of the young listeners, equally between both age groups, are interested in increasing their music skills

and general music knowledge.

Highest level of interest in

acquiring individual knowledge

in music exists in almost all

countries of Europe. Among

the 10% who disagree with this

statement, the highest numbers

can be found among the young

listeners and musicians from

Greece, Ukraine, Slovenia and Italy.

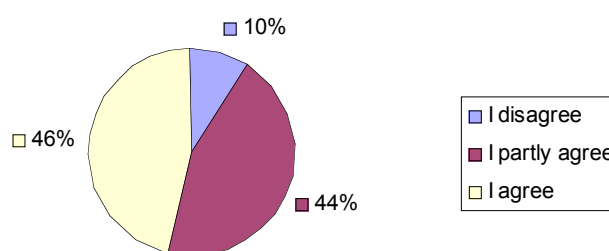
37% of the respondents (young listeners and musicians together) believe that both formal and non-formal education is quite expensive: 25.5% believe that only non-formal education is expensive, while only 18.2% believe that only formal music education costs more.

*Given the fact that it is the young listeners's opinion that music education, both formal and non-formal is quite expensive, and the fact that music organizations do not reach out to the general youth population, we are faced with a demand that is currently not addressed by the existing services of music providers.*

### ***General music education***

Young listeners and young musicians were asked to assess the general music education in their countries: 68% in total believe that the general music education has lower treatment (status) than the other subjects, in the educational curricula. There is thus a general trend among young people and the public to consider this subject as something that is not so important for the students.

**Young people want to increase their individual knowledge in music**



In detail, 46,8% of the young listeners consider that there are not enough hours of music education in their schools, no specially equipped classrooms (42,9% of the respondents) with a low level of didactic materials (54,7% of the respondents). As part of the general music education, the students are only satisfied with the current level of music theory and history taught, as well as with the quality and the qualifications that their teachers have – 84,6% of the respondents.

The index of agreeability among the young musicians who attended ordinary schools is almost the same as the opinion of the young listeners when concerning the general music education in schools. There is a high level of confidence in the music teachers and their qualifications as well as confidence in the good relation between the students and the teachers, while the young musicians tend to show a lower level of satisfaction with the general conditions in which music education is being taught in school.

Except for singing (60,5% of the respondents both listeners and musicians), there is very little practical application of the music knowledge: 68,5% of the students have stated that no dancing is taught, while 63.3% of the respondents say that they have never been taught to play on different instruments within their general education.

The fact that the majority of students do participate in orchestras and choirs (67,9% of the respondents, mostly young musicians with parallel professional music education or self-developed musicians) but have never been taught to play on different instruments in school shows that either schools are not equipped with instruments, thus the students have no chance to get acquainted with them, or that students -mostly the ones who have chosen professional music career while attending general education or have chosen some instrument as their hobby (amateur musicians)- are restricted to playing only one instrument.

In overall, the level of satisfaction with the general music education by the music operators who responded is low and follows the general trends among the young listeners and young musicians. They are mostly dissatisfied with the number of music hours per week in schools, while they are mostly satisfied with the teachers and their qualifications.

### ***Young musicians are not consulted when designing the music education***

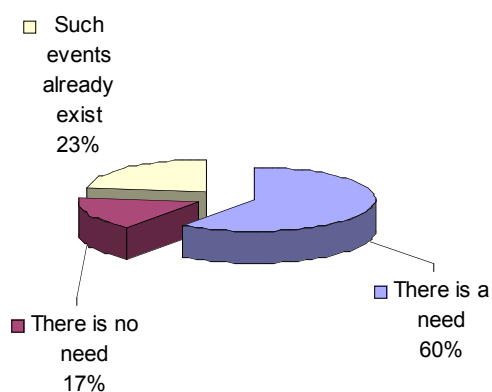
Mapping the situation across Europe, it appears that young musicians do not participate in the design of the formal music curricula and are not consulted on a regular basis by the education institutions. Only 12,2% of the respondents think that they are being consulted, while 61,3% disagree completely. Mostly the young musicians in UK, Greece, Ukraine, Belgium and Netherlands consider themselves consulted when designing the formal music education programs, while a particularly low level of satisfaction with their participation in the consultation processes can be seen among the young musicians in the countries of the Balkans and Eastern Europe, and from the EU countries in Ireland, Germany, Austria, Slovenia and Italy.

The analysis also shows that high school students (47%) are more frequently consulted on the design of the secondary school curricula than in music university/highschool students are consulted on the music curriculum (around 25%).

### ***Training for musicians outside the formal education system***

The question refers to those musicians who are self-educated, musicians who gained their skills through home practice, outside the formal music education system either private or

#### **Training for musicians which are not in the formal music education system**



public. In the Balkans, they are usually referred to as "amateur musicians" a term that might be considered offensive in other countries. In Sweden for example, the ones who have obtained a formal degree in music and the ones who are self-taught, are considered as musicians all together.

However, the particular case of Sweden can be explained by the fact that the pop-market in this country is extremely big, thus giving the self-taught musicians a high profile and more opportunities in terms of additional, out-of-school education and learning.

opportunities in terms of additional, out-of-school education and learning.

The highest awareness for the need of events where self-taught musicians can be trained exists in Sweden, Macedonia, Slovenia, and Ireland: again, in Poland, 95% of the interviewed musicians do not consider such a training an important part of the work of the music operators. A higher level of awareness for such training exists as well among the youth group aged 20-24.

### ***School concerts and concerts in / with schools***

*Under the term **school concerts** we refer to concerts that are being organized by schools, within both general education and music education systems, and held either inside the schools or outside in the community. Under the term **concerts in schools** we think primarily of the concerts which are organized by other stakeholders in the music field but which take place in any type of school.*

While the students (both young listeners and young musicians) are in general satisfied with the level and the number of the concerts organized by schools, the respondents have stated that those events are primarily organized with students from their own respective schools: 63,8% of the respondents stated that students from other schools do not participate in concerts organized by schools. The number of teachers who play together with their students is extremely low as well – 62,3% of the students responded that they do not take part in public school concerts. Famous artists are as well rarely invited to schools to take part in public performances: only 25,4% of the students stated that their schools practice such events and traditions.

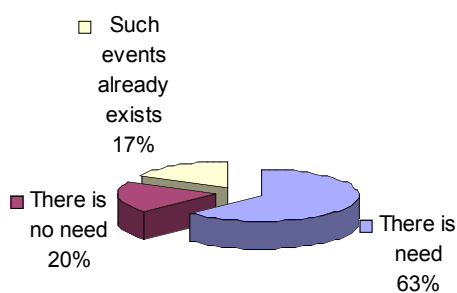
The majority of the young listeners - 55,6% also consider that their schools do not organize public concerts (open for the general public), even if they are organized outside the schools (63,1% of the responses, meaning concert halls etc.): based on experience, such concerts are usually organized for the students, the school staff and the immediate relatives of the students (closed environment). The lowest count and outreach among young listeners can be observed in Spain, Sweden, Italy, Ireland, Portugal, Greece, with a somewhat divided opinion in Central Europe (except Germany and Slovenia – highest counts) and the Balkans, to very high numbers in outreach and satisfaction in Russia.

Exactly 84,8% of the young listeners stated that not all music styles are represented at the concerts organized by schools. The highest number, 52,4% responded that classical music

is the most preferred music style at those concerts (predominant answer among the professional music students); then pop music with 48,6% of the answers (predominant in the general education schools); followed by ethnic / traditional music with 40% of the answers (predominant among both young listeners and musicians); finally, only 39,5% of the respondents believe that rock music is part of the school concerts organized.

The music organizations have a relatively good outreach and good cooperation with the music schools when organizing concerts: in average 65% of the young musicians stated that music students attend concerts, which are organized by music organizations in school. This outreach is somewhat lower in the general education schools and especially among the age group 20-24, (40% of this age group do not agree with this statement).

60% of the respondents believe that students attend concerts in schools organized by music organizations while exactly 40% strongly disagree with this statement. Among the 60%



who agree, the majority has a music background or attends a formal music education institution. The outreach is quite weak among the young listeners without a music background or the ones attending other educational facilities.

The majority of the young listeners aged 15-19 attend such concerts while the music organizations' outreach is much weaker among university students and young listeners aged 20-24.

## **B. Musicians: discovery, promotion and mobility**

63,7% of the young listeners stated that there are structures and institutions that discover and promote young music talents in their country: 69,3% believe that such a role is not performed by the general education schools, as opposed to 74% who believe that this is the primary role of the professional music schools. 67% of the young listeners in general stated that young talents should be discovered and promoted by the music organizations, which is higher than the 53,5% who believe such tasks are performed by music industry.

In general it shows that young people are slightly more confident in the non-profit music organizations, than in the music for-profit sector.

However, we cannot neglect the 33% of the young listeners who do not believe that music organizations perform this role to a satisfactory level. In Portugal, almost 99% of the young listeners are not satisfied with the role of the music organizations when it comes to young talents: the low level of satisfaction also exists in Denmark, Estonia, Poland, Germany, Ukraine and Russia, where enormous confidence exists in the schools. *This cannot be attributed to the low capacity of the music organizations, on the contrary, it can be explained by the traditionally strong educational systems.*

Among the music organizations, the majority of them have an excellent knowledge of the existing structures for the discovery and promotion of young talents (48.7%): even more, the majority of the operators have developed their own internal structures and programs for such purposes. The majority of the respondents believe that talent discovery and promotion is being done by the music schools (76.6%), by the music organizations (75.8%) by the specialized institutions for young people and talents promotion (72.5%). A significant number of the music operators believe that talent discovery and promotion is the responsibility of the ministries of culture and other governmental agencies with 51.3% but also of the commercial music industry (51.7%).

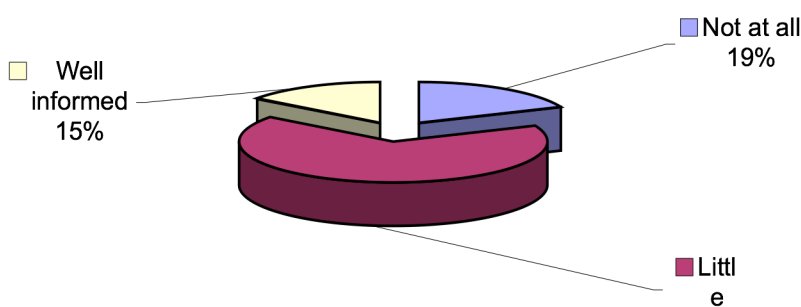
Only 9,8% of the music operators are fully satisfied with the current level of support for promotion of young talents given or demonstrated by the Governments of their respective countries. Significant number, e.g. 69.4% of the music organizations, believe that the Governments are not doing enough in this field: in some countries, for example in Macedonia, the Ministry of Culture is directly responsible for supporting young talents through internal criteria and predefined application procedures: the music organizations can only support such applications (by letters of recommendation etc.), but do not play any major role in the decision-making process and in the distribution of the funds. This practice was introduced in 1998. Before that, it was the music organizations and the professional music institutions which had a certain level of initiative towards the Government: the organizations, through internal mechanisms, decided whom they supported and applied then to the Ministry for funds.

Only 34.1% of the music operators responded that there are organized governmental systems for scholarships and student loans which are supported by the government in all areas including arts and finally in the music field specifically: however, a somewhat high number of 14% are either not informed or stated that such organized systems do not exist.

When asked about the existence of an organized system supported by private donors and the business sector for scholarships and student loans for talented young people there is an equal number of music operators that are either not informed (17%) or believe that such a system does not exist (17%). Only 20.7% of the respondents believe that such an organized system exists in their countries, in all fields of interests for young people, the arts fields included and music especially. Other areas besides arts are well covered with such organized systems, amounting to 42.3% of the answers: it shows that the private sector is mostly interested in funding talented young people in areas other than arts - one might speculate that such support is extremely predominant in areas that are of importance for the development goals of the private sector.

The majority of 66% of the young listeners feel that they are not getting enough

**Existence of supporting structures that promote young talents**



information about the existing possibilities for their promotion and affirmation: on top, 19% of them do not have any type of information thus disabling a significant number of the musicians from interacting and addressing the music operators whose mandate

is to discover and promote young talents in the country and abroad.

The highest number of young musicians that consider themselves well informed about promotion possibilities exist in UK, Luxembourg and Macedonia while the lowest numbers can be observed in the Eastern European countries of Russia, Bulgaria and Ukraine.

A more effective information system exists among the institutions that target high school students and young musicians aged 15-19 than among the institutions, working with students and musicians in the higher education system.

Approximately 28,6% of the young listeners know of the existence of specialized programs for scholarships and grant-support for young music talents in their countries, equal to the number of those who do not know about such programs. In addition, 32 % of the respondents heard about such programs in other areas but not in music and arts in general. As a conclusion, the majority of the young listeners have no information whether such programs exist in their countries and are thus not aware of the opportunities they offer.

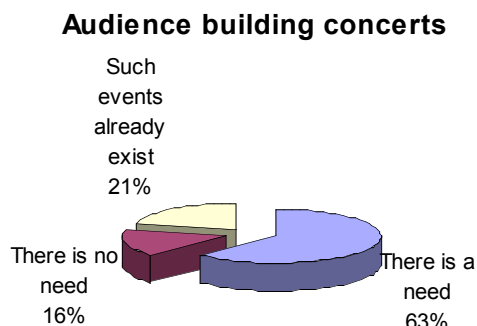
A significant number of the young listeners, about 47%, responded that they are not informed if specialized organizations for the mobility of young talents exist in their countries. 24% of the respondents believe that such structures exist and that they are part of the music NGO sector, while 16% believe that such structures exist in both the government and the music NGO sector.

On average, the index of agreeability that young musicians are moving outside the country (either permanently or temporary) searching for more or better opportunities for education and promotion in the field of music is somewhat high among the respondents (2.8 from maximum 4). The promotion index is higher among the music students than the one among the high school students who responded on those questions, while in the education field the situation is the opposite.



## II. AUDIENCE BUILDING

”Audience building events” represent an important tool in the development of not only musical preferences of young people, but also of the general music education of the



population. Music operators usually use such tools in order to boost the music learning process among the population, mostly children and young people in a creative and innovative way that includes the active participation of the audience (participatory approach). Generally speaking, the events usually encompass different music styles with the use of animators who facilitate the

interaction between the audience and the performer/s: According to the *ExTEND Audiences Awareness Action* Workshop on project inception and management of concerts for young audiences (Austria, Vienna, 7-10 October), there are a variety of on-going projects that can be considered under this general definition:

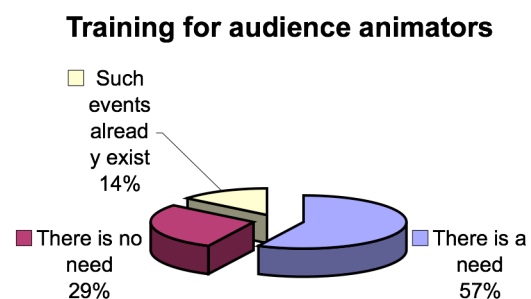
- Pre-performance talks – designed to introduce audience members to aspects of the concert they are about to hear.
- Post-performance talks – offering the audience an opportunity to talk to the performers after they have played
- Family – concerts specifically designed to welcome the whole family, catering for all ages and making the environment child-friendly
- JMI Club – concerts with a small group of young people who have joined JMI, in which they have the opportunity to talk to the performers, some chances to participate and then to hear the concert
- Interactive – offered on a large and small scale: either in a large concert hall with lots of school children or in a school hall with a class of children
- Concerts with an introduction and commentary focusing on different aspects of music, composer or orchestra
- Concerts that follow the progress of the music through storytelling

- Mixed media concerts with animation, dance, puppetry etc to help illustrate what is happening in the music
- Birthday parties – children can book places to a concert and get an organized party after the concert
- Teddy bear concerts where young children can get into the concert if they bring their teddy bear.

Thus a non-formal approach is used in the traditionally formal setting of the concert halls. Those types of activities are related to the JM concept of audience building, which represents one of the four pillars of the overall JMI strategy.

In total 63% of the young listeners consider that audience building concerts are important and needed for the general education in music of the citizens. In UK and Ireland there is a high level of satisfaction with the current level of concerts and events for audience building. However, there is a significant part of the young listeners that would increase the existing offering to a higher level. The need for such events exists to the highest degree in the Balkan countries, Sweden and Eastern Europe. Such a need is expressed more among the young musicians aged 20-24 then among the teenagers and the high school students.

In order to facilitate the concept of audience-building, most of the music organizations that use this type of methodology deploy trained people who act as animators and interlocutors between the performers and the audience. Such a role can be undertaken by trained youth leaders with a music background; *however, continuous training and experience sharing is needed in order to maintain the high level of interaction and innovation in the approach to this concept. Further to that additional training will be required also for the project managers and for the organizations themselves, in order to further support the implementation of audience building events.* For the participants of the *ExTEND AudiencesAwarenessAction* workshop in Vienna such training is important in order to promote sustainable audience-building activities, thus identifying two types of



training: to raise the awareness of the work done by the music operators in this field (e.g. among programmers, organizers and conductors) and to promote the sustainability of the concept (e.g. among musicians, children-to be mentors and trainers).

As an example, such training courses have been organized on a continuous basis in the past and are a well-known capacity building tool among the countries of former Yugoslavia once they were integrated as part of their overall activities.

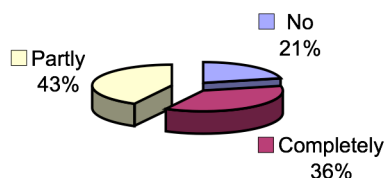
Speaking about the research, the highest level of awareness for such a need exists among the above-mentioned countries as well as Sweden and Eastern Europe amounting to 57,7% of the response among the young musicians. Such a need is not felt among the young musicians in Bulgaria, Poland, and Germany. In UK and Netherlands the numbers are equally divided and all together with the ones who do not feel the need for such training, they comprise a respectable number of 29%. Only a small number of 13,2% of the young musicians are satisfied with the current level of training organized in order to maintain the implementation of the audience building concept.



### III. STANDARD OF LIVING: EMPLOYMENT AND INCOME

Only 36% of the employed young musicians are completely satisfied with their job

Young musicians' satisfaction with job position

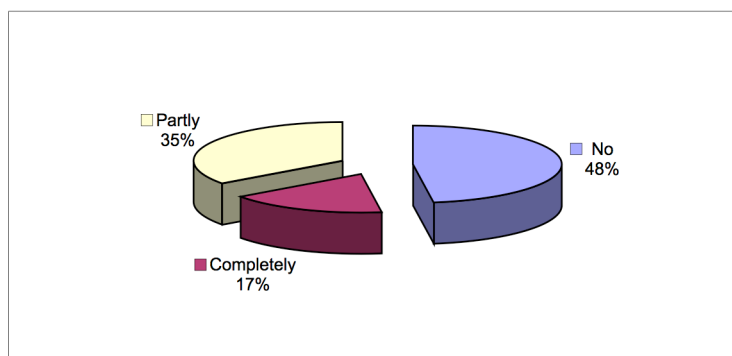


position when compared to their level of education and the skills gained in the process. The highest number, exactly 43%, are only partly satisfied, which means that there are certain conditions and criteria which

are not being met by their employers in the music sector: a deeper analysis of those conditions is required to determine what determines the fulfillment of young musicians' needs.

Male musicians are less satisfied with their working conditions place: a high percentage of young musicians aged 20-24 are not satisfied with their job conditions when compared to the musicians aged 15-19 who are working part-time or as free-lancers.

From a country perspective, a high level of satisfaction exists among employed young musicians in UK, Ireland, Estonia, Ukraine and Poland, compared with a high level of dissatisfaction in Bulgaria and Italy.



Almost half, e.g. 48% of the young musicians consider, that the salaries that they can get once employed will not correspond to the level of their professional education and to the qualifications and skills that they have obtained and invested in.

There is a high level of dissatisfaction with musicians' salaries in the countries of the Balkans, Russia and the Netherlands: the highest level of satisfaction exists among the young musicians in UK and Ireland.

There is a huge gap between the opinion of the two age groups interviewed during the research. The majority of the young musicians aged 20-24 (around 60%) expressed high

concerns about the level of their salaries, while the high school students are less worried with the prospect of their future employment and standard of living. Female musicians are less satisfied with the level of their salary than the male musicians. Using the employment status as starting point, the unemployed musicians are less satisfied with the salary levels in the music sector than the employed musicians, while the highest level of dissatisfaction (almost 60%) exists among the young musicians who are studying but also working, full or part-time.

*Taking into account that the majority of the respondents stated that young people are interested in acquiring a formal degree in music or increasing their individual knowledge in music, and comparing those statements with the current enrollment levels of professional music institutions, one may conclude that the huge gap exists partly due to the partial dissatisfaction with the level of salaries and the higher level of disagreement with the working conditions in the music sector.*

In this matter, the young musicians consider that the music institutions for which they work / could work are the ones most responsible for setting up high professional working conditions and standards – on a scale from 1 to 4. the index of agreeability shows a tendency of 3.3. An agreeability index of 3 exists when it comes to the Government, e.g. the Ministry of Culture: the young listeners consider this Ministry highly responsible for providing the required level of financial, technical and legislative support that will enable high standard and quality working conditions. Finally, among the top level stakeholders responsible for such standards and quality are the professional associations of musicians (agreeability index 2.97): as organizations they belong to or will belong to one day, the young musicians consider them important tools for channeling their opinions and needs to the government and to the employers in the music sector (advocacy and lobbying, e.g. interest groups), giving them important attributes of professional trade unions in the music sector. Next on the agreeability scale are the young musicians themselves, with an index of 2.89: young musicians feel that they have an overall responsibility not only as performers, but also as important actors and partners of music operators in setting up the required working conditions.

*This shows that as much as young musicians they are channeling their demands and needs through their professional associations, they also prefer to do so directly. After all, the*

*professional associations of musicians will be successful if they have the full and active participation and interaction of their members, both within their own structure and with other music operators. Therefore, empowerment of musicians must be high on the agenda of music operators in order to receive the required feedback related to their work and working conditions. As a concept, the empowerment related to the professional relationship with other working institutions and with their own employees, their employment rights, standards and working conditions, also means significant involvement of musicians in the overall management of professional music institutions.*

The agreeability index among music operators follows in general the same pattern of answers as the young musicians. However, when asked about who is responsible for establishing professional standards and conditions the agreeability index among young musicians is somewhat lower than the one among music operators. The music operators consider the educational music institutions as the most responsible for setting such standards, with an agreeability index of 3.24. The second on the list are the national ministries of culture, with an agreeability index of 2.93. Third ranked are the music organizations and not the professional music associations as the young musicians responded: they come fifth on their scale after the young musicians themselves.

*Good working conditions can certainly contribute to the further development and best performance standards of musicians themselves, create a higher level of competence and increase the competitiveness on the market, however, the primary incentives for the quality standards lie within the musicians themselves and usually begin with from talent, motivation and then the skills learned during the education process.*

When asked about the quality standards of performance, young musicians consider themselves (motivation, creativity, willingness and persistence) and their talent as primary reasons that influence their competitiveness and employability (agreeability index 3.6 respectively 3.4). Third on the agreeability scale are the music education system and institutions they attend or have attended (index of 3.3). Finally, the music institutions where they work and thus the working conditions and standards come fourth with agreeability index of 3.2.

The music operators share a similar opinion with the young listeners, with a slight difference regarding music education: among the music operators, the majority considers the young musicians themselves responsible for the quality standards of performance with an agreeability index of 3.68; however, the music organizations consider the music education system more responsible than the young musicians and put it second on the list with an agreeability scale of 3.47; third on the list, is the young musicians' talent (index of 3.42) and the music institutions to which they belong to, with an agreeability index of 3.22.

### ***Obtaining a good standard of living through music***

Finally, the agreeability index of both young listeners and young musicians related to the question if young musicians can make a good standard of living from their music is average standing at 2.4 points, on a scale from 1 to 5. It shows that young listeners in general are not satisfied with the prospects and quality of life that a professional music career brings for the majority of the employed in the sector: such a belief is higher in percentages among the young female than among the young man. From a national perspective, the young listeners from the EU countries tend to believe that musicians cannot make a good living from their music much more (some 20% more on average) than their peers in the other countries in Europe.

### ***Mobility and standard of living***

The young listeners in general have a tendency to move outside the country to searchy for a better quality of life. The agreeability index among all respondents (both youth and musicians) is 3.1. The index of agreeability is much higher in the countries of Eastern Europe, Ireland and the countries of South Europe (excluding Greece). The young listeners in Belgium and Netherlands tend to remain in their own countries.

#### **IV. MUSIC PREFERENCES: YOUNG LISTENERS AS CONSUMERS OF MUSIC**

##### ***Spending free time***

On a scale from 1 to 4, most of the respondents (young listeners and musicians) believe that young people spend their free time by surfing the internet (agreeability index of 3.68%), then watching TV (agreeability index 3.66), playing games on the computer (3.62), going to discothèques (3.55), downloading music from the internet (3.44), going to the cinema (3.42), talking on the phone (3.43), sport activities (3.40), visiting friends (3.35); going to parties (3.33), and listening to the radio (3.24).

Out of the 11 most frequent ways of spending their free time, at least 6 of them are directly or indirectly connected to exposure to music and music listening (passive exposure).

##### ***Music styles preference / information flow / consuming of music***

The most preferred music style among the young listeners is pop music, with 82% of the answers positive, compared to the classical music preference, which amounts to only 11,1%, plus contemporary classical with 12,9%.

86,7% of the respondents believe that the music industry and the media influence their music preferences. In this matter, young listeners in most cases tend to turn to the media for information on music and their music needs and interests: for example, 83,6% use Radio channels as a source of information, followed by TV music channels with 78,3%, and the internet with 72,6%: music organizations as direct information source are used by only 29,5% of the respondents, the lowest count after schools with 18,2% of the answers.

The most preferred media format through which young listeners consume music are CDs, with 91,7% of the answers, internet, both streaming and downloading with 70%. DVDs are becoming a more and more powerful media for both audio and video consumers, at present amounting to 50,5% of the answers. This shows that, even if young listeners prefer to go to concerts to socialize with their peers (as shown later in the research), consuming music is becoming a more personal and individual habit: 79,6% of the young listeners use personal computers to listen to music, followed by radio channels with 76,5%: although 71,3% of the young listeners also listen to music in cafes and clubs, this can be more related to their social life rather than to listening to music as a primary goal for visiting those places. The

individual character of listening to music is finally proven by the fact that only 45,4% of the young listeners do so at public concerts. *However, the fact that many young listeners do not attend public concerts because of the variety of the current offer as well as for economic and elitist reasons (as shown later in the research), shows that the individual nature of listening to music is influenced not only by personal choices but also by the nature of public and private services and their preferences as well as by social and economic standards set for such public events.*

When it comes to the current offer of music events young listeners assess that there are quite a lot of events featuring music concerts with domestic pop, rock music bands (jazz and blues almost the same data) e.g. around 39%, respectively 27% of the responses. The contemporary classical music with domestic musicians and from domestic composers also stands high in the current offering of music events (50% monthly and weekly in total). However, the percentage of young listeners' knowledge of concerts of classical and contemporary classical music (as well as traditional music) with foreign artists is significantly lower. The lowest percentage of information and knowledge of such events can be observed for concerts with traditional and ethnic music originating from other ethnic communities in the same country.

Young listeners mostly prefer to attend public concerts and events with domestic and foreign popular music (pop, rock, etc.), some 79,2% in total, followed by concerts with traditional music with foreign artists - 30,3%. The classical and the contemporary classical music events with domestic artists and composers are rarely attended by young people, some 11,6% of the responses, with a small preference for concerts of classical music with foreign artists (22,2%). This is extremely important to compare with the fact that around 98% of the young listeners interviewed have an excellent knowledge of the frequency when classical music events (opera, ballet, oratorio, etc.) occur in their country (sometimes, often, never, etc.), however they are rarely attended due to the evident lack of interest.

According to the music organizations, young listeners are mostly interested in attending concerts and events with foreign groups and artists in pop, rock, rap etc. music, followed by such events with domestic groups and artists with an agreeability index of 4.43 respectively 4.33. When it comes to classical music, the agreeability index is almost half on the scale from 1 to 5, with 2.6 points for classical music events with domestic artists

and 2.9 (a bit higher) for classical music events with foreign artists. As opposed to the opinion regarding the preferences of young people, the music operators are highly concentrated on the organization of classical music events, with the highest agreeability index of 2.4 for events with domestic artists and 2 for events with foreign classical music artists. The agreeability index shows that classical music events are organized by the music operators on a yearly to monthly basis (agreeability index 2 - yearly up to 5 - daily).

### ***Attending music events: trends and ratio***

According to the music organizations, young people attend concerts primarily because they want to see and listen to their favorite idols in person (88% or agreeability index of 4.4. on a scale from 1 to 5); to have fun and a good time (86,1% or agreeability index of 4.3); to enjoy music in general (75,7% or agreeability index of 4.1), and because some music styles are trendy and popular at that moment - mainstream (77,6% or agreeability index of 4). 71% (or agreeability index of 3.9) of the music operators consider the music events to be the place where young people interact, meet other people and make new friends.


The answers given are not very different from the ones provided by the young listeners and the young musicians: the main reasons why young people attend preferred music events: to have fun and to see and listen too their favorite idol in person, were the most preferred answers among 88,5%, respectively 80,6 % of the respondents, followed by the statement “to enjoy music in general” by 77,4% of the answers. The socialization element is also very important for the young listeners, amounting to 62,5% of the interviewed.

### ***Young listeners and idols in the world of music***

In general, only 25.6% of the respondents stated that young people do not have idols from the music field, compared to 74.4% that strongly agree that they do have music idols.

We have asked the young listeners and the young musicians to identify which music styles their idols represent: around 95% of the respondents believe that young people have idols from the popular (pop, rock, punk, techno etc.) music, followed by 65% with idols in jazz and blues music, then 50% in traditional and ethnic music of their countries, respectively around 60% in world music; finally, around 40% of the respondents believe that young

people have idols in the field of classical music: the high percentage of responses oriented towards idols in classical music (even if fourth on prevalence scale) can be explained by the fact that the majority of the musicians who participated in the research come from the field of classical music.



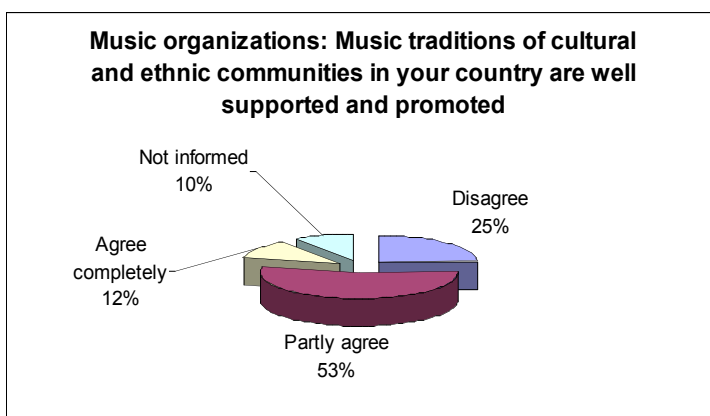
## V. MULTICULTURALISM AND YOUNG PEOPLE

### *Music traditions of cultural and ethnic communities in your country are well supported and promoted*

In overall, the majority of the respondents agree that the traditions of communities with different socio-cultural backgrounds (60.1%) and of other countries (65.5%) are well supported and promoted in their countries. However, only 16% respectively 21.3% of them fully agree with this statement, while the majority, representing 43,8% respectively 44.2% of the total answers agree only partly. Certainly this can tell us that there is a lot of room for improvement in order to achieve full support and promotion of minority groups in the field of music, as well as to improve the bilateral and multilateral cooperation in the exchange of musicians, but also that young people are not fully familiar with this issue, as, as said before, the majority doesn't receive enough information or attends music events where music traditions of other ethnic communities are cherished and promoted<sup>5</sup>.

The young listeners and the young musicians from Croatia, Luxembourg, Italy, Poland, Serbia and Montenegro and UK have the highest number of responses that indicate a lower level of support for other ethnic and cultural communities in the country: the highest number of responses indicating a lower level of music events where the cultural traditions of other countries are presented exists in Ireland, Russia and Poland.

Among the music operators, in total 65.7% of the responses indicate that the music



traditions of cultural and ethnic minorities in their countries are well supported and promoted: among those who agree with this statement, only 11.7% agree completely, while 54% only partially. It suggests that although in general services for

<sup>5</sup> Chapter IV, Section Music styles preference / information flow / consuming of music

promotion and support of minority music traditions exist in that country, there is still space for further improvement.

***Can traditional music influence commercial pop / rock music?***

In total 77,6% of the respondents believe that traditional music in general can influence the predominant commercial pop / rock music: completely certain of such a possibility are 34.5% of the interviewed young listeners and musicians while 43.1% are partly certain. When asked whether traditional music could become serious competition for commercial pop / rock music, the percentage of the ones who are negative amounts to 39.7% of the responses, but still the majority, 60.3%, are certain that such future development could be possible. Such a statement shows that traditional music rates quite high among the preferences of young listeners as music consumers.

Among the music operators, in total 86% of the respondents believe that traditional music can influence the predominant commercial pop music.

However, on the question if ethnic music could become serious competition for the dominant commercial pop music, 38.9% of the music operators believe that such competition is not possible, with only 13.6% who fully agree that such a possibility is viable. A significant proportion of the music organizations, 36.2%, have a divided opinion and agree only partially, given the traditional and socio-cultural context of the countries.

***The common cultural heritage and the young listeners***

First of all it is worth mentioning that almost 17% of the respondents have no opinion on this question: of the ones who did respond, the majority of the young listeners (89.2%) believe that there are elements of common cultural heritage in Europe, common for all the countries on the continent: however, only 39.2% fully agree with this statement, while exactly 50% agree only partially. According to their opinion the roots of this common cultural heritage in the music field can be found in all types of music (primary answer – 31.5%), ethnic music and classical music (equal percentage second choice – 24.7% & 24.8%) and pop music (third choice – 17.2%).

*Baseline assessment on youth and music in Europe*

The majority of the music organizations, 89.1%, believe that such elements of common cultural heritage exist among all countries in Europe: almost half of the respondents, 49.1%, fully agree with the statement, while a significant number of 40% partially agree. Those elements can be found in all types of music with 34.7% of the answers, classical music with 28.7%, ethnic / traditional music with 20% of the responses and pop/rock music only 7.2%.

*The distribution of answers among the music operators and the young listeners shows that music in general and of all types is the primary carrier of a common cultural heritage among European countries: however, apart from the common agreement on the role of ethnic music and classical music, more young listeners allocate such a role to pop and rock compared to the number of music organizations who share the same opinion.*



## **VI. MUSIC AS A TOOL FOR DEVELOPMENT**

In question 40 of the young listeners questionnaire we use the term “music as societal phenomena” which is broader than music per se, and includes playing, listening, learning, socialization, identity building, skills development, building personal and aesthetic values, etc. In such a way, we directly link the attitude of the young towards the accessibility of music with the JMI mission statement “To develop young people through music across all boundaries”. The results of the question, cross-tabulated to other questions will underline important aspects such as social integration, socialization and youth empowerment.

### ***Perception of music***

On a scale of 1 to 4, the majority of the respondents (both young listeners and young musicians) believe that (agreeability index of 3.7) the primary role of music is to develop the creativity of young people, followed by the perception of music as an interesting profession for young musicians and an interesting hobby for young people in general. (Agreeability index of 3.66); music is also important for the development of the personality and the intellect (agreeability indexes of 3.59 and 3.51); young listeners and musicians also tend to agree with the statement that music is an important tool for intercultural learning (agreeability index average 3.55) for learning about, meeting and respecting other cultures. The socialization element is also very important and comes immediately after the intercultural dimension of music (as much as they are interlinked) with an agreeability index of 3.51. As part of the social skills and the socialization of young people, the development of communication skills and creating a feeling of belonging to a group are much appreciated by the respondents as well, with agreeability indexes of 3.4, respectively 3.2). The majority of the statements with a high agreeability level represent an important part e.g. elements of the youth empowerment concept.

The majority of the music organizations, almost 99% (agreeability index of 3.8 on a scale of 1 to 4) believe that music represent an important role for the development of personal creativity among young people, a source of aesthetic pleasure with an agreeability index of 3.67, a means to develop their personality 3.67, to develop personal aesthetic preferences among young people (3.65) and to acquire broader learning skills.

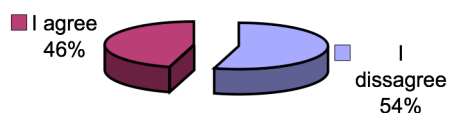
More than 95% of the music operators consider music as an important tool that offers young people the opportunity to meet, get to know and gain respect for other cultures: music as a predominant and very important communication tool (96,5%) represents an important part of young people's life and an excellent incentive for building their overall awareness for the world in which they live in, enabling them to interact with and accept other cultural values. It thus influences the development of young people's individual life styles, a statement that is shared by 84,9% of the respondents.

Music as a social phenomena also represents a respectable channel for young people's interaction and social cohesion (94,5%), offering them possibilities to meet other people. Music is predominant (without neglecting the other factors!) in determining young people's subcultures and creates the feeling of shared values with other young people (belonging to a group – 84,3%).

58,8% of the music operators believe that music should help people to earn money: such a perception is driven by the professional orientation and nature of the music operators, striving to bring music, musicians and their performances to the highest professional standards: this position of the music operators is reinforced by the perception that music should be a profitable profession (82,9%) for professional musicians, provides with a good standard of living: one must allow that some organizations consider as profitable not only the money one can gain from music but also the recognition and appreciation by the audience, full participation in public life as well as renown name and position.

### ***Music is accessible to all social groups of young people in your country***

#### **Young people: music is accessible to all social groups in the country**

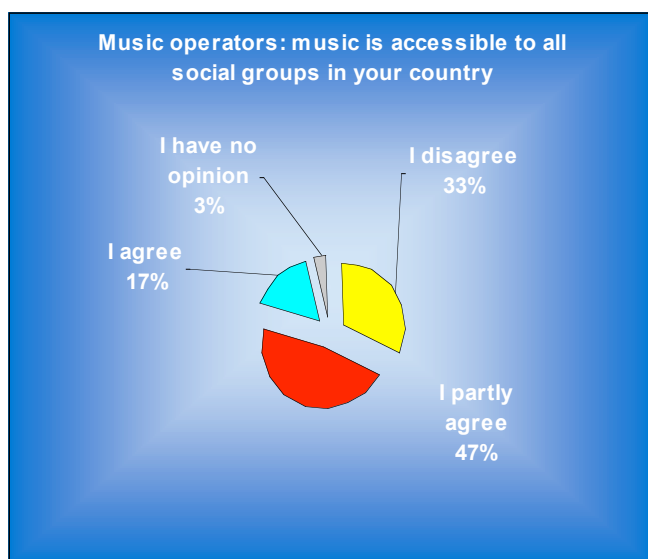


Since according to the young listeners music represents an important tool for the development of young people, it was our intention, to further ask if music as a societal phenomena (playing, listening to, buying CDs, participating in orchestras, learning etc.), is

accessible to all young people in the country. A slightly higher number of young listeners disagree with the statement considering that there are social groups in the country that do

not have equal access to music and music events like the rest of the population. Those percentages are higher in the countries of Eastern Europe where accordingly, the economic situation renders the ability of young people to satisfy their cultural needs on a regular basis and where the cultural offer and services deteriorate due to the lack of financial support.

The young listeners in Ireland share a similar opinion as well, while the highest level of belief that music is accessible to all social groups in society exists in the countries of central Europe and Scandinavia.



The situation is somewhat different among the music operators; 64% of the respondents agree or partly agree with this statement, believing that all social groups in the society enjoy full access to music. This might be attributed to the fact that their experience and their contacts with the target groups significantly differ from the ones shared by the young listeners. The fact that out of

the ones who agree with the statement, 47% only partly agree, shows that the outreach of the music programs and activities on all levels need further improvement. A fair number of the music operators, 33% have a negative opinion about this statement. The majority of the music operators in Macedonia, France, Ireland, Portugal, Poland and Estonia believe that music is not accessible to all social groups, while the highest percentage of agreeability exists in Russia, Ukraine (100%) and Holland.

***Need for intercultural meetings of young people where music is used as a tool for interaction***

The majority of the young listeners believe in the power of the music as a tool for social interaction among young people in general. Approximately 69% of them believe that music can be a successful method for young people to meet each other and share their values. 18,3% of the young listeners believe that such events already exist and no further expansion of those programs is needed.

Such a result is a logical conclusion of young people's perception of music, the values it carries, the identification with music styles and creation of sub-cultures and its importance in their everyday life, as explained above<sup>6</sup>.



---

<sup>6</sup> Chapter VI, Perception of music

## VII. RESPONSE TO NEEDS

### *The role of the music organizations*

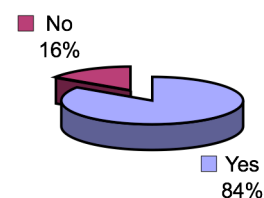
Young listeners and young musicians assign multiple tasks to music organizations and have high expectations towards them regarding the fulfillment of their musical needs. Many of the music organizations today are focused on the organization of concrete projects and activities – music festivals, concerts and similar events: a majority of them also concentrate on deepening the formal music education of young musicians through out-of-school activities. Speaking about young listeners in general, the majority of interviewed confirm such perspectives, thus the general well-being of young people to other institutions (and the young people themselves!). The organization of concerts in schools is also not high on the young listeners agenda for the music organizations, being second from the bottom on their preference scale. However, a significant part of the young listeners also believe that music organizations should be involved in passing music culture on to the younger generations, which is understandable bearing in mind the low level of satisfaction among young listeners with the general music education taught at schools<sup>7</sup>.

Compared to the high level of young people today that consumes music through the Internet there is an extremely high demand for music organizations to expand into the promotion of young musicians and the distribution of music via Internet (data bases, alumni, etc.).

Finally, the young listeners feel strongly that music organizations should care about their needs and interests and undertake some advocacy activities presenting their wishes to governmental structures.

The majority of both the young listeners and young musicians – 84% consider that music operators should serve as information disseminators regarding various music events and the

**MO as information source**



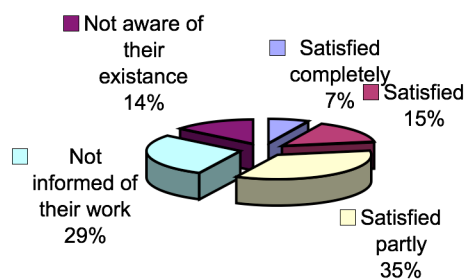
<sup>7</sup> see Chapter I. EDUCATION AND TALENTS. The general music education

happenings of the music scene in the country, except in Estonia and Portugal where the opinions are divided almost equally. Both the young listeners and the young musicians aged 20-24 perceive music operators as information focal points more than the teenagers. However, at present, only 29% of the young listeners turn to music organizations on a regular basis to find useful information related to their musical needs and interests.

The music operators prefer to advertise their events directly via the internet (agreeability index of 3.75), then via billboards, posters, flyers etc. with an agreeability index of 3.64, through the daily newspapers (3.51) and directly through schools and universities (3.33). The level of satisfaction with the cooperation with the stakeholders in the respective advertising field more or less follows similar patterns: the highest level of satisfaction exists with the use of internet as a source for advertising, followed by advertising agencies (billboards, flyers, etc.), schools and universities and finally written media - daily newspapers come fourth on the satisfaction scale.

### ***Satisfaction with the work of music organizations***

Some 22% of the interviewed young listeners and musicians are fully satisfied with the



work carried out by music organizations: partially about 35% with 43% in total of the ones who never heard of their work or of their existence. *These figures leave space for further elaboration and*

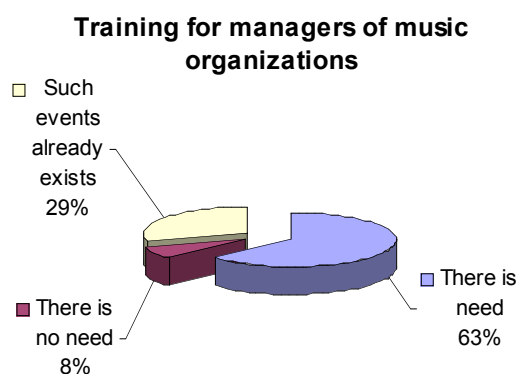
*focus on group investigation. But it is a fact that young listeners are not consulted on their needs and interests, on their preferences of music styles, the type of music events they attend, that they are not actively involved in the work of music organization and thus music organizations are not matching the needs and the interests of young people.*

Again, music organizations have a higher outreach among young listeners aged 15-19 than to the second age group interviewed. A higher number of young listeners are not familiar

with the work and the existence of music organizations in the countries of South Europe and in Sweden, while the highest numbers of outreach and knowledge of their work can be observed in UK, Ireland, Russia and Netherlands.

### ***Need for training for managers of music organizations***

The majority of the young musicians agree that seminars and training courses should be organized in order to enable the managers of music organizations to perform to higher standards which is extremely important as they are the direct participants and beneficiaries of their projects and activities.



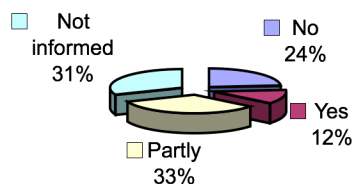
In the UK, although the majority of the young musicians are satisfied with the current services and music events, and although almost half of them consider that the existing training possibilities are enough to satisfy the needs of the music organizations, almost 50% consider that more training is an important aspect in the life of music providers: such division

shows that there is an awareness for the need of continuous training of music operators, in order to achieve continuous standards in their everyday operations.

Almost 90% of the young musicians in Poland and 55% of them in Holland consider that such training is not needed.

### ***Are young people consulted by music organizations?***

Only 12% of the young listeners think that music organizations consult them on a regular



basis and to a large extent about their needs and preferences in the music field. There is a significant number of those who feel that youth is partly consulted – e.g. on an irregular basis; we feel free to conclude that it only refers to certain issues and for isolated activities and projects. However,

24% of the interviewed feel they are not consulted at all, with 31% who are not informed at all on this issue, most probably because they have no contacts or have no information about the work and the structure of music operators, they have no contacts with music organizations at all.

On a national level, a partial consultation process exists in the countries of the Balkans, UK, Sweden, Netherlands and Ireland, while to a lesser degree in Eastern Europe, Spain and Portugal.

Comparing the age groups, there is a significantly lower level of students and young listeners aged 20-24 involved in any type of contacts and consultation processes with music organizations than the opposite.

Contrary to the young listeners, the majority of the music operators state that they consult young people on a regular basis, for most of their activities, while the percentage of the music organizations that consult young musicians is extremely high.

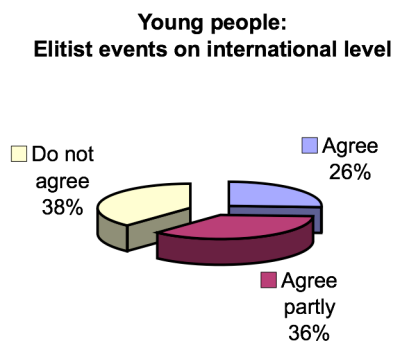
Music operators assess the needs and the interests of young musicians for all activities (41.8% of the answers), for extremely important activities (37.4%).

Music operators tend to consult the needs and the interests of young people in general as well: for all activities, 37.7% although somewhat lower than the young musicians) and for extremely important activities 38.9%.

In general young listeners are interested or would be interested in attending music events as much as possible, both on a national and an international level: there are however, many obstacles that prevent them from being regular visitors of such events.

***Accessibility of domestic and international music events***

Some 60.6% of the respondents believe that many locally organized music events are not open to the general public and are thus inaccessible and elitist from their point of view. Out of those, only 20.8% agree fully while 39.8% only partially. A significant number of



them strongly disagree with this statement (39.4%).

Among the music operators, 51% in total (fully or partly) agree that there are many music events that can be considered “closed” to the general public and thus for the youth population, that are elitist in nature.

On the international level, the majority of the young listeners and young musicians agree that there are a lot of important events in the music field that they would like to attend but can’t because of its elitist nature. It is worth making a deeper analysis in order to determine the exact reasons for such opinions (e.g. expensive tickets, no access to the venue, selection of audience, no public information, no public ticket sales etc.).

A high level of satisfaction with accessibility of music events exists in the Scandinavian countries (Sweden and Norway) as well as in Bulgaria, Luxembourg and Greece. There is a high number of inaccessible events in the other Balkan countries and in Eastern Europe.

Among the music operators, 47.2% consider music events organized in other countries as elitist for young people: almost 30% do not agree with this perception, while if not high, a significant number of the organizations have no opinion on this matter (19.6%).

***Expensive music events on national and international level***

The majority of the respondents, e.g. 54.6% fully agree and 36.8 % partially agree (for some events) that tickets are too expensive for the events they would like to attend. There are also other costs involved on the national level (for example, if young people need to go from a local community to a bigger urban center to attend music events) and the response on this matter equals 85.6% of the young listeners. On the international level, the situation

is similar, and a slightly higher percentage fully agree that young people cannot attend due to the high costs of the tickets (65.6%) with only 27.8% who partially agree. When traveling and staying in the country where the event is organized is in question, almost 95.8% of all respondents are restricted to events in their own country due to such reasons. In total (fully or partially), 83.8% of the music operators consider that the tickets for music events on national level are too expensive for the young people. In addition, approximately 67.6% of the music operators consider that there are also other costs involved if young people want to attend a music event.

On the international level, there is a high level of agreeability with the statement (expensive tickets), e.g. 74.7%.

### ***Music events are held too far from young people's home***

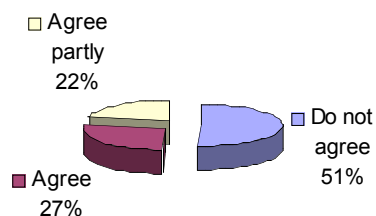
63.3% of the answers state that young listeners are not satisfied – fully or partly with the level and frequency of music events in their local community: many events that are usually organized in the bigger urban cities and are directly accessible to young people.

On the contrary, among the music operators there is a significant division on this issue approximately 50.9% of the music operators disagree with this statement, while 40% believe that not all music events and programs are able to outreach young people in the communities where they live.

### ***Visa regulations***

The opinion of both young musicians and young listeners on this issue is completely

**Young people: visa regulations as an obstacle**



divided, with an almost equal number of those who agree with the statement (49%) and those who disagree (51%) that visas are an obstacle for the mobility of youth in the music sector.

51% of the high school students agree with this statement and 51% of the respondents in the age bracket 20-24 disagree with it.

From a national perspective, a high number of young listeners and musicians from Eastern Europe perceive visas as one of the biggest obstacles that renders their possibility to study and promote themselves abroad, as well as to attend music events in other countries. The majority of the young listeners and musicians in the EU do not consider the visa regime as a major problem for their mobility. In Ireland and UK, many of the interviewed subjects share the same opinion as their peers in Eastern Europe.

Among the music operators, it is important to mention that almost 21.7% of the respondents have no opinion on this issue, while 46.1% do not agree that visas are an obstacle for participation: here it is important to make a digression: *for events that are organized by the music organizations and involve audiences and performers who are being invited to take part as part of the cooperation policy with music organizations in another country, the visa issue might not be of such importance as they can be obtained as part of the activity management cycle: however, for the majority of public music events where young people simply have a wish to attend (for example pop / rock concert), visas can become a potential problem for their mobility.*

### ***Types of activities organized locally (music operators response to needs)***

The music operators on the local level are mostly involved in the organization of concrete activities that offer the citizens concrete services that satisfy their cultural needs in the local communities: the organization of concerts is the most preferred form of local music activity, organized by some 82,5% of the local respondents, immediately followed by concert production with 58,8% of the respondents.

A majority of the local music operators cares for the cultural needs of young people: 57,5% of them organize concerts that target young people in the community. Festivals are another common events cherished by the local organizations (43,8%).

On the educational side, 48,8% of the local respondents organize music seminars and workshops of various kinds on a regular basis: music camps and courses are the preferred local music education events for 33,8% of the respondents.

Orchestras, choirs and competitions are less preferred forms of local level events, estimated at 33,8% respectively 35% and 26,3% of the responses, predominantly among the local educational institutions, as part of the formal educational system.

A small number of the local organizations are involved in lobbying (21,3%) and organizing interest groups that will support the music development in their community (17,5%): a relatively low number of the local music operators are involved in some kind of network (31,3%) or in the organization of consultative meetings in the field of music (25%). Those percentages show that most of the local music operators are closed organizational structures that do not interact enough with the rest of the community stakeholders in the music field: this has a limited impact on the overall, “life-wide” music education of young people who are not able to maintain a balance between formal and the non-formal music education and learning.

Combined with the fact that, on local level, music operators are mostly project-oriented (concert and concert production), it shows that, although music represents an important part of the community’s everyday cultural life, few or no long-term objectives are mainstreamed into the local cultural policy development.

Some 31,3% of the respondents support other local music organizations, predominantly among the local governmental and educational institutions, out of which, and in total, 13,5% give financial support to others.

Only 13,8 % of the local music operators maintain internet data bases in the field of music, which means that collection, processing and dissemination of information (one of the predominant needs of the young people in order to be aware of the world around them) is not developed to its full potential in the local communities.

### ***Need for seminars and master courses for professional musicians***

There are a big number of such activities already being organized by all major stakeholders in the music sector, among which, the education institutions and the music organizations are the ones who tend mostly to be oriented towards those education forms.

The opinion of the young musicians to this question is completely divided. While 43% of the respondents believe that such events already exists thus no need to further expand those programs, a slightly higher percentage of the musicians (47,3%) but still significant

for the overall analysis stated that those programs should be expanded with more activities, e.g. more master courses and seminars.

***Need for seminars for “amateur” musicians***

Here again we refer to those musicians which are not part of the formal music education system but gained their skills through peer education, self-taught procedures, etc.

The majority of the young musicians (60,9%) feel that there is a great need to further strengthen their musical background with music seminars or similar activities.

***Need for meetings where young musicians can learn and gain experience from famous musicians***

Most of the young musicians mostly (63,2%) appreciate programs and activities in the music learning process that enable them to interact and learn from famous musicians. Such programs are extremely important not only for the transfer of professional skills but also for the transfer of know-how and concrete experiences. To further support their critical approach and creative thinking and performance, young musicians must be exposed to a variety of experiences and best practices with various famous musicians. A very high level of agreeability with this statement exists among the young musicians in Macedonia, Ireland, Serbia and Monte Negro, Russia and Cyprus.

Still, a significant number of young musicians stated that there are quite a lot of those events are already organized by the music operators (29,1%) (Thus, no need for them) mostly concentrated in UK, Slovenia and somewhat in Bulgaria. In Poland for example, the majority of the young musicians (almost 63%) believe that such events are not needed at all.

***Young musicians as active participants in live music events as performers and authors***

In general, the organizers of different music events tend to engage young musicians in their projects as performers and this is evident all over Europe according to the positive answer received by the respondents (96% fully and partly - of the young musicians). The participation of the young musicians as authors (composers) is somewhat lower, where only 24,7% of the young musicians answered that they fully participate and 47,5% only

partly: one may say that the partial participation can be explained by a higher or lower presence of music authors / composers in different music styles and music forms, which depends not only on the existence of organized and structural authors / composers education in some music fields (classical, jazz, pop-rock etc.), but also on the personal music preferences of the young authors and the employment potential of / the competition in the music sector.

There is a somewhat significant if not high number of young musicians who responded that young musicians do not participate as authors in music events (27,8%): the number of those who gave such an answer is particularly high (around and above 50%) in Ireland, Bulgaria and Italy, and significant (between 40 and 50%) in Luxemburg, Germany and Netherlands.

When it comes to the opinion of the music operators, 62.3% believe that young musicians participate fully as performers in the music events, with 31.3% partial participation.

When it comes to young musicians as authors, the percentages are somewhat lower, but still the level of agreeability with the statement is high: 44.2% think that they fully participate, while 40.8% only partially.

When asked if young musicians participate in the music events as organizers, the general prevalence is still positive towards the statement: however, the majority of the music operators (some 45.3% of the answers) consider this participation as partial, not full, which means that there is still a lot of room for improvement in order to enable young musicians, e.g. young listeners to fully engage in music events as organizers. Only 24.5% of the respondents fully agree with the statement and believe that young musicians participate in music events as organizers. Only 12.5% consider that such an opportunity is not given to the young people at all.

### ***Young musicians as active participants in live music events as organizers***

In all, around 70% of the respondents stated that young musicians participate in live music events as organizers. However, the participation is mostly partial (47% of the respondents), meaning that there is still room for improvement and for the full integration of young musicians as organizers or team leaders in projects. Only 23% of the young

musicians are completely satisfied with the level of involvement with the highest count observed in UK and Estonia.

The lowest level of participation of young musicians as organizers of live music events (above 50% of the answers) is observed in Bulgaria and Ireland followed by Austria and Luxembourg (between 40 and 50% of the answers).

Young musicians aged 15-19 are less involved as organizers than those aged 20-24. More female respondents tend to believe that young musicians do not participate as organizers in the live music events than male respondents.

### ***Obstacles for cooperation among music operators***

Funding for travel represents an important obstacle in the development of European cooperation among music organizations (83.8% of the respondents), followed by funding for personnel (qualified staff) with 76.2% of the responses and funding for materials and communication with 60.8% of the answers.

The majority of music operators in majority (72.8%) also believe that funding organizations are not interested in funding activities that promote cooperation on a European level. For example, 70.9% of the interviewed organizations believe that there is a lack of support by European institutions and that it represents one of the major obstacles for the development of the European cooperation.

62.3% of the music operators consider the lack of knowledge of potential partners as one of the most important obstacles for strengthening cooperation between music organizations in Europe.

The opinion regarding the access to information is completely divided: almost equal number of respondents show that the issue of access to information is still a very important one that needs to be tackled in future projects.

### ***Music operators' development needs***

The music operators were asked to assess the development needs in different areas of their work, and define the biggest needs and challenges for successful international cooperation. In general, over 90.5% of the respondents believe that there is a need to further

strengthen the cooperation on the European level and develop new contacts across the European continent (98.4% of the answers).

If we compare this with the statement that music operators consider funding as a direct obstacle to the development of their European cooperation (in terms of staff, travel, materials and communications), as explained in the previous chapter, the a logical conclusion made by the music organizations is that there is a tremendous need to develop the existing cooperation on the European level. (71,3 % of the answers).

89.4% state that there is a need for the music operators to develop new contacts across the European continent.

The music operators also feel that there is a need for more direct financing in the filed of music with 92.8% of the responses.

When it comes to sharing information on policies, regulations and legislation in the cultural field that affects music, music cooperation and programs, in general the music operators are interested in such dissemination (83.8% of the answers). However, the further breakdown of the answers shows that only 40.4% are fully in favor of such information dissemination, while 43.4% only partly agree. It shows that there is a significant number of operators who do not necessarily regard such information as crucial for their work, but it is still good to compare: it might also come from the fact that there are many music operators who apart from being involved in direct activities and programs in the field, take very little time or interest in policy developments, lobbying and advocacy work.