

CONTENTS

Abstract		
Para.	Title	Page
Chapter 1	Introduction	1
1.1	Background	1
1.2	Aim of research	2
1.3	Contribution to Knowledge	2
1.4	Areas covered by research	3
1.5	Business focus to thesis	8
1.6	Sourced material	9
1.7	Literature review	10
1.8	Objectives	13
Chapter 2	Methodology	
2.1	Introduction	15
2.2	Thesis structure	16
2.3	Sources	16
2.4	Breadth of research	17
2.5	Methods of research	18
2.5.1	Case Study method	18
2.5.2	Reflective practice	20
2.5.3	Reliability of research	21
2.5.4	'Mass' culture perspective	23
2.6	Potential limitations	24
2.7	Conclusion	25
Chapter 3	How the impact of the marketing campaign devised by EMI for the <i>Four Seasons</i> recording in 1989 influenced subsequent marketing strategies in the classical music industry	
3.1	Introduction	27
3.2	Marketing aims pre-1989	27
3.3	SWOT analysis	28
3.4	Growing the business	29
3.4.1	Image and perception	29
3.4.2	Promotional opportunities	30
3.5	The <i>Available</i> and <i>Unavailable</i> Audience	31
3.6	Anderson's <i>The Long Tail</i>	32
3.7	The Long Tail in a classical context	34
3.8	PRS for Music: The long Tail interrogated	35
3.9	'Hooked on Classics' model	35
3.10	The <i>Four Seasons</i> marketing campaign	36
3.10.1	Background	36
3.10.2	Range of media	36

3.10.3	Television	37
3.11	Subsequent strategic classical campaigns	40
3.11.1	Your Hundred Best Tunes	40
3.11.2	The Essential Pavarotti campaign	41
3.12	The first Three Tenors release	42
3.13	Warner Classics promotion for Chloe Hanslip	43
3.13.1	Hanslip advertising strategy	44
3.13.2	Specialist advertising	47
3.13.3	Hanslip retail focus	47
3.13.4	Editorial decisions	48
3.13.5	Radio interviews	49
3.13.6	Targeted marketing	49
3.14	Classical artist-led advertising	50
3.15	National newspaper promotions	52
3.16	Specialist classical label website proposal	53
3.16.1	Proposal	53
3.16.2	Page navigation, layout and design	54
3.17	UHRecordings marketing strategy	54
3.17.1	Objectives	55
3.17.2	Public Relations	56
3.17.3	Advertising	56
3.17.4	Website	57
3.18	Royal Philharmonic Orchestra and branding	58
3.18.1	Public funding	58
3.18.2	Press material	59
3.19	Promotion linked to live events	60
3.20	HMV	62
3.21	Leafleting	63
3.22	Range of distribution	65
3.22.1	eMusic model	65
3.22.2	<i>In Rainbows</i> model	67
3.23	BBC Symphony Orchestra	67
3.23.1	BBCSO Barbican weekends	69
3.24	Data bases and use of subscriptions	73
3.24.1	CBSO	73
3.25	Marketing for 'high art'	74
3.26	Radio 3 brand campaign	74
3.26.1	Background to campaign	75
3.26.2	The pre-requisites of the plan	77
3.26.3	Core values	77
3.27	Other examples of CD marketing campaigns	79
3.28	Conclusion	85

Chapter 4 An examination of the impact of the internet on the classical music business with particular reference to how technology has changed classical music business models

4.1	Introduction	87
4.2	Value of digital economy to the music business	88
4.3	Take up of broadband	90
4.4	The recording business	93

4.5	Podcasting and the Listen Again facility	95
4.6	Social networking and illegal file sharing	96
4.7	Internet-led projects and the <i>In Rainbows</i> model	97
4.7.1	Tasmin Little	98
4.7.2	Barbara Hendricks	99
4.7.3	Tom Hampson	100
4.7.4	Benjamin Grosvenor	100
4.7.5	MaxOpus	101
4.7.6	Nicola Benedetti	101
4.8	Online developments in the record industry	102
4.8.1	Chandos	102
4.8.2	Hyperion	103
4.8.3	Decca	103
4.8.4	Deutsche Grammophon	103
4.8.5	EMI Classics	104
4.8.6	Sony/BMG	105
4.8.7	Naxos	106
4.8.8	Arkiv Music	106
4.9	Other online business models	108
4.9.1	Rhapsody	109
4.9.2	eMusic	109
4.9.3	Napster	109
4.9.4	Puretracks.com	110
4.9.5	Play.com	110
4.10	Balance between High Street Stores and Digital	110
4.10.1	HMV	112
4.10.2	Classical World Ltd	113
4.11	BBC Radio 3 and downloading	114
4.12	Classical music and the internet	115
4.13	Growth of internet usage	115
4.13.1	Digital growth reports	115
4.14	Quality of downloading	117
4.14.1	Bit rate for downloading classical music	119
4.14.2	Lynn Records	119
4.14.3	Other models	120
4.15	Streamed music	120
4.15.1	Spotify	120
4.15.2	British Library	121
4.16	Models used by live performance organisations	122
4.16.1	English National Opera	122
4.16.2	Royal Opera House	123
4.16.3	Metropolitan Opera House experiment	124
4.16.4	St John's College, Cambridge	124
4.17	Visual material online	124
4.17.1	Visual and audio production of classical music	125
4.18	Orchestral websites	125
4.18.1	www.philharmonia.co.uk	125
4.18.2	www.cbso.co.uk/bbcso.co.uk/www.rsno.org.uk	126
4.18.3	www.lso.co.uk	126
4.19	Online concert listings and orchestral digital initiatives	127
4.19.1	RLPO interactive experiment	127

4.19.2	Philharmonia interactive project	128
4.19.3	Berlin Philharmonic Orchestra	128
4.19.4	Social networking	129
4.20	Avie Records	130
4.21	Mail Order model	130
4.22	Digital Rights Management	131
4.23	Free music downloading sites	132
4.23.1	Qtrax and We7.com	132
4.23.2	My Space	133
4.23.3	Passionato.com	133
4.23.4	Dilettante	134
4.24	Classical DVDs	134
4.25	Online criticism	134
4.26	Conclusion	135

Chapter 5 A critical analysis of classical music broadcasters in the UK, reviewing the range of programmes they provide and examining how these organisations have adapted their business models since 1989.

5.1	Introduction	139
5.2	Sky	140
5.2.1	Sky channels	140
5.3	BBC television content	141
5.3.1	BBC 2 and BBC 4	142
5.3.2	Classical music on terrestrial channels	144
5.4	Overview of classical music on BBC Radio and Classic FM	146
5.5	Listenership figures	147
5.6	Public Service Broadcasting	149
5.6.1	Definitions of Public Service Broadcasting	150
5.6.2	Establishing a Public Service Broadcaster	152
5.6.3	Public Service Broadcasting abroad	154
5.7	An evaluation of classical music on BBC Radio	156
5.7.1	Radio 3 content	157
5.7.2	Breadth of programming on Radio 3	158
5.7.3	Distinctiveness of Radio 3's content	159
5.7.4	Use of new technology on the network	160
5.8	The cost of Radio 3	162
5.9	The Proms and its broadcasting strengths	166
5.10	Broadening the scope of classical listening	168
5.11	Classic FM Radio	169
5.11.1	Commercial ventures	171
5.12	Breadth of content	172
5.13	Digital broadcasting	174
5.13.1	Internet radio	174
5.13.2	Classicalwebcast.com	175
5.14	Conclusion	176

Chapter 6	The contribution that music within the arts sector makes to the economic health of the UK and how business models are adapting to generate further income.	
6.1	Introduction	178
6.2	Contextualising music within UK cultural landscape	179
6.3	An overview of costs associated with the classical music sector	181
6.3.1	Instrumental costs	182
6.3.2	Concert venues	184
6.3.3	Venues in and outside London	184
6.4	The contribution of performance as part of the live music sector	186
6.5	Recording	188
6.5.1	Recording venues	190
6.6	Financial worth of culture and music to the UK economy	191
6.7	Business activity in the classical music broadcasting field	193
6.7.1	Examples of Classic FM joint venture deals	193
6.7.2	Further examples of collaborations between business and arts organisations	194
6.8	Combining brands	195
6.9	Music tie-ins with mobile phone companies	197
6.10	Number of businesses in the creative industries	198
6.11	Sources of funding	200
6.12	Patronage	202
6.13	Range of public funds for classical music projects	205
6.13.1	DCMS	205
6.13.2	Arts Council England	206
6.13.3	Youth Music	206
6.13.4	Awards for All	207
6.14	Regional Arts Council funding	208
6.15	Other available resources	210
6.15.1	Local Authority Funding	210
6.15.2	The British Council	211
6.15.3	Royal Philharmonic Society	212
6.15.4	PRS Foundation	213
6.16	Trusts and Foundations	214
6.17	Recording industry	215
6.18	Additional business initiatives	216
6.18.1	360 degree model	217
6.19	Rights Income	219
6.19.1	BMG Rights management	220
6.19.2	Changes in UK copyright	220
6.20	Apple as a driving force for music	221
6.20.1	Nokia	221
6.20.2	Sony Ericsson	222
6.20.3	T Mobile G1	222
6.21	Market penetration	222
6.22	Government employment initiatives	223
6.23	Conclusion	223
Overall conclusion		227-230

**Bibliography
& Acronyms**

231-233

**List of
Practitioners**

234 -236

Appendices