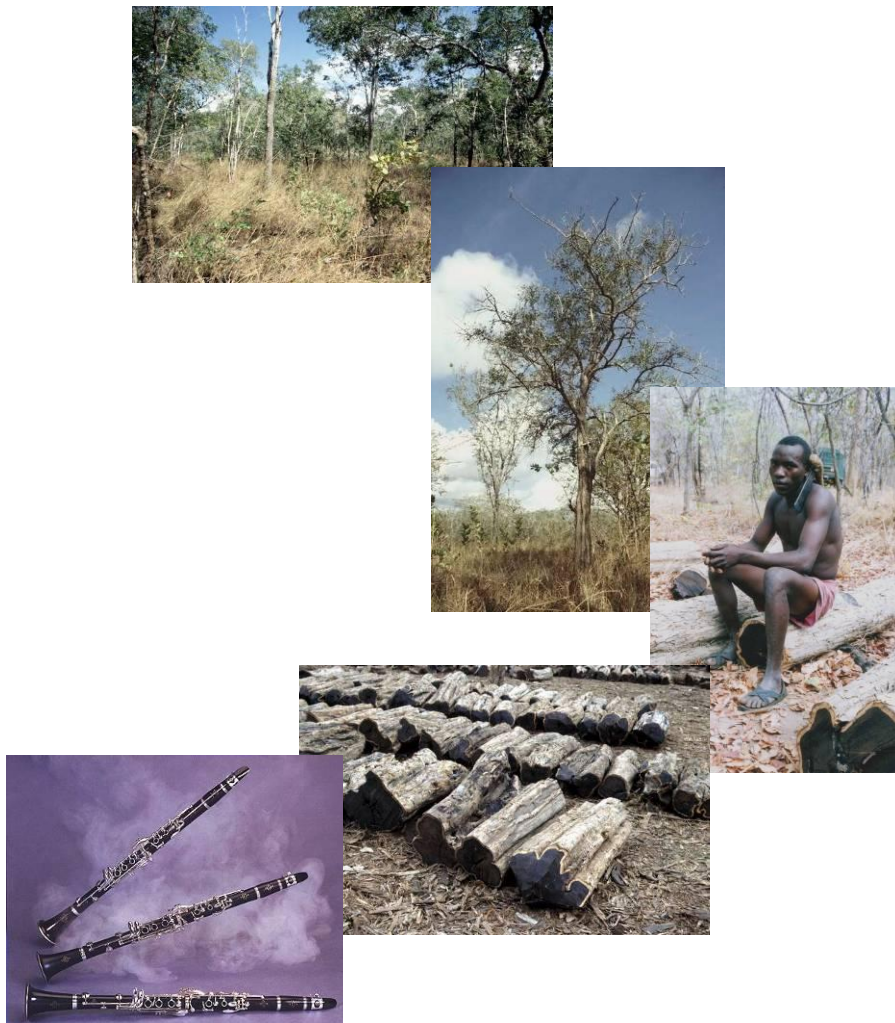


Key Issues for Players of Musical Instruments made from African Blackwood (*Mpingo*) in the UK



Paul Harrison

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Produced by Environment Africa Trust, UK
With the support of the Mpingo Conservation Project and Kilimanyika



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Executive Summary

1 Background

The African Blackwood tree (*Mpingo* in Swahili) is one of the most valuable timbers in the world. Dark, lustrous heartwood makes it the medium of choice for wood carvers and strong international demand comes from producers of musical instruments including clarinets, oboes and bagpipes. Extensive demand and poor forest management is pushing it towards commercial extinction in much of East Africa where it is found in greatest quantities.

Under-resourced governments in the region lack the ability to enforce their own regulations, and illegal logging is widespread. Instead governments are slowly devolving the responsibility for managing the forests, together with the attendant benefits, to poor rural communities. Sustainable management of these forests would thus have substantial benefits for both the environment and poverty alleviation. However, in order to get the best price for their timber communities need to differentiate it from wood sourced from other areas. Guaranteeing a fair price for communities and ensuring environmental best practices in management can be ensured by supplementing community forest management with certification by the Forest Stewardship Council (FSC), so that products can be labelled as made from blackwood which has been felled sustainably from community-managed forests, and for which a fair price has been paid.

Founded in 1995, the Mpingo Conservation Project (MCP, registered Tanzanian NGO No. 1739), has been carrying out practical work to develop PFM in the south-east of Tanzania since 2004. MCP is working in partnership with the Environment Africa Trust (EAT, UK Charity No. 1025443) in order to develop new opportunities in fair trade for African blackwood. EAT and MCP's shared vision is to continue to develop the work in Tanzania, securing long term livelihoods for the forest communities based upon sustainable management of their forest resources.

In July 2007, EAT was awarded a Project Development Grant (PDG) from funders Comic Relief. The project development grant was utilised for EAT & MCP's ongoing work in understanding and developing the processes required for certification of community managed forests in Tanzania and resultant sustainable trade between communities and end-users in the UK. This report is an output from that work. It provides background information on consumers that will support MCP, EAT and partners in their objective of seeing a fairly traded, certified supply of African blackwood which can be made into musical instruments. It features the results of a small consumer survey of musicians covering customer types, key issues, demand assessments and perceived willingness to pay a premium for musical instruments made from certified timber.

2 Key Findings

Broadly speaking, classical musicians are typically highly aesthetic people, creative yet precise in the way they play their music, and similarly so in the way in which they engage with life in general. As such, the appeal of a fairly traded, certified instrument tends to fit well with the typical musician's personality and purchasing decisions. Ethics, moral choice and environmental sustainability are important to these consumers. Conservation and fair trade concerns are most important of all.

Consumers can be classified as professional, semi-professional or amateur. Students, depending on their levels can be regarded as either semi-professional or amateur. Professionals may play in symphony orchestras, as soloists, as chamber musicians or in specialist associations such as early music ensembles. Symphony players are the most common, making up perhaps three-quarters of professional woodwind players. Chamber musicians account for an estimated 15% of professionals whilst approximately 5% are soloists and an estimated 5% are specialist performers.

The purchase of a premium oboe or clarinet represents a major investment and instruments are usually repaired rather than replaced, but the wear and tear on woodwind means they are replaced more regularly than say string instruments. Buying a musical instrument is, in retailing parlance, a 'wants' rather than a 'needs' purchase. Typically the need for a functional instrument is outweighed by the aspirational aspect of

buying an instrument, a purchase that makes the musician feel that not only are they investing in quality, and they are improving themselves and benefiting their audiences by paying extra for a better product.

Linked to this is the critical issue of quality. It is clear from this research that to reach the requirements of a musician, particularly above the amateur level, a fairly traded, certified product will not be enough to sway the potential buyer. The most important factor in deciding on a purchase is not its price, nor the origins of the wood, nor the social and ecological impact, but the intrinsic quality of the instrument itself. Qualities of sound, of feel, of function, and of material are all essential to the buyer. Yet if the quality aspirations and requirements of the consumer can be met, strong demand exists for FSC-certified, Fairtrade and other ethical products, sold with a price premium, especially at the top end of the market. A product's provenance and added value is a selling point. Consumers generally are increasingly making buying decisions on a product's 'eco-value', especially for premium and luxury products, and FSC-certified instruments would fit well into this picture.

In the current eco-conscious consumer market, asking buyers of musical instruments to pay a small percentage price premium is a realistic proposition. Some 78% of musicians questioned stated they are willing to pay a more for a certified, fairly traded instrument, with three quarters of those indicating they would be prepared to pay a premium of between 10-25%. This aspect of the research is absolutely fundamental to the viability of the project. End consumers have indicated a willingness to pay the premium that is necessary to fund the FSC certified supply chain that will deliver increased incomes to forest-dependent communities.

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Abbreviations and Acronyms

| | |
|---------|----------------------------------|
| CAB | Certified African Blackwood |
| EAT | Environment Africa Trust |
| FLO | Fairtrade Labelling Organisation |
| FSC | Forest Stewardship Council |
| FSC-CAB | FSC Certified African Blackwood |
| MCP | Mpingo Conservation Project |
| MSC | Marine Stewardship Council |
| NGO | Non-governmental Organisation |

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Context

Natural resources are the most valuable assets of most developing countries; the recent global commodities boom has significantly boosted the economies of countries throughout sub-Saharan Africa. However often the benefits of exploitation are captured principally by economic and political elites, with little trickle down to the communities living in, on and around the natural resources being exploited, and who typically remain mired in poverty.

One potential solution to this problem is community-based management of natural resources, which has been tried and developed across the global South over the last twenty years. Repeatedly, the biggest challenge has been to ensure real and direct benefits to the rural communities who are being passed the burden of management responsibility. This is no different in Tanzania, where a programme of Participatory Forest Management (PFM) has achieved noteworthy successes in giving rural communities rights over their local forests, but thus far few communities have realised significant financial benefits. Poverty is widespread in rural Tanzania, and PFM must contribute to community social and economic development in order to be relevant.

The most valuable species found in the forests of south-eastern Tanzania is African Blackwood (*Dalbergia melanoxylon*), also known as *mpingo* in Swahili and *grenadilla* in Spanish. It is a highly valuable timber in international trade which is used in the manufacture of high quality musical instruments. In the UK, blackwood is used in the manufacture of clarinets, oboes, flutes, recorders, whistles, smallpipes and bagpipes. In Africa, it is used extensively for the production of carvings. The first step to ensuring a sustainable supply of blackwood in future is to entrust the management of blackwood stocks to communities in Tanzania who will benefit from a sustainable trade in this timber. One cubic metre of billets can fetch up to \$18,000 on the export market, making it one of the most valuable timbers in the world. The Mpingo Conservation Project (MCP) was formed to leverage that incredible value for the benefit of local communities. However illegal logging is widespread, with some 96% of timber emanating from the region not properly licensed.

Communities wishing to manage their own forests must thus compete in a market flooded by unrealistically cheap timber. The project therefore seeks to supplement PFM with certification by the Forest Stewardship Council, so that products can be labelled as made from blackwood which has been felled sustainably from community-managed forests, and for which a fair price has been paid. Musicians, thereby able to distinguish ethically-sourced instruments, will be able to support the industry in improving its practices through buying power. At the same time communities will benefit from the substantial revenues that they can earn from selling logging rights, the profits of which can be invested in locally-prioritised development actions for the benefit of all community members.

Aims and Objectives

Comic Relief funds were divided between work in the UK (managed by EAT) and Tanzania (managed by MCP) and have supported a number of key activities. One of these was to research the supply chain of African blackwood with particular emphasis on the retail market for musical instruments. This report is an output of that research. It provides background information that will support MCP, EAT and partners in their objective of seeing a fairly traded, certified supply of African blackwood which can be made into musical instruments.

On behalf of EAT, Kilimanyika carried out a short consumer survey of musicians covering customer types, key issues, market sizes, demand assessments and perceived willingness to pay a premium for musical instruments made from certified timber. The work included evaluating different types of consumers buying musical instruments, understanding key types, evaluating any key trends and issues, evaluating the niche market of Fair Trade, certified and other green/ethical brands, assessing the level of understanding of ethical/certified instruments, assessing the willingness to pay a premium for ethical/certified musical instruments and finally, to summarise opportunities and feasibility.

Consumer Types

1 Defining Musicians

For the purposes of this report musicians can be classified as either professional, semi-professional or amateur. Students, depending on their level of attainment can be regarded as either semi-professional or amateur. Professionals may play in symphony orchestras, as soloists, as chamber musicians or in specialist associations such as early music ensembles. Symphony players are the most common, making up perhaps three-quarters of professional woodwind players. Chamber musicians account for an estimated 15% of professionals whilst approximately 5% are soloists and an estimated 5% are specialist performers. Instrument players cross the entire age spectrum.

Broadly speaking, classical musicians are typically highly aesthetic people, creative yet precise in the way they play their music, and similarly so in the way in which they engage with life in general. As such, the appeal of a fairly traded, certified instrument tends to fit well with the typical musician's personality and purchasing decisions. Ethics, moral choice and environmental sustainability are important to these consumers. Conservation and fair trade concerns are most important of all.

Because of their cost, generally only graduates or professionals use instruments made from African blackwood. Beginner and intermediate level instruments are mostly made of plastics and materials other than African blackwood.

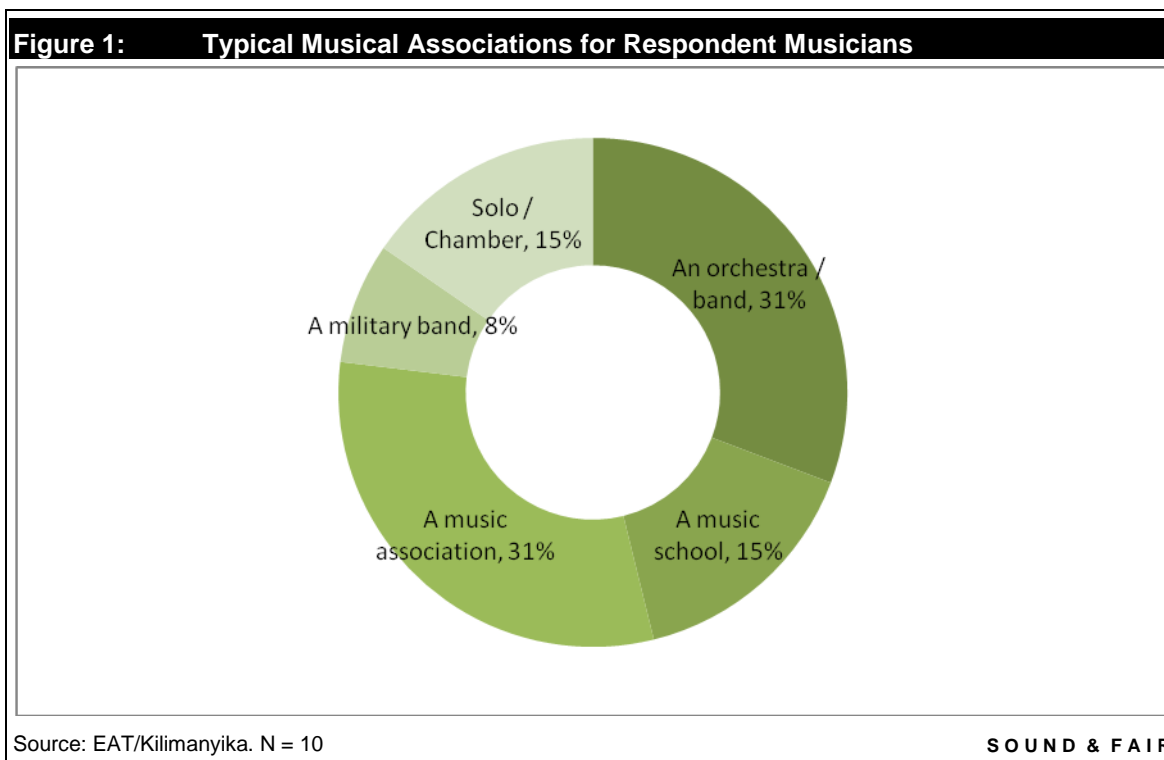
As part of this report, quantitative questionnaires, see Appendix 2, were sent to over 100 musicians. Of those, 10 were able to give the time to respond in full. This is a lower sample size than would be preferred however a combination of time constraints and the niche interest of the survey meant that interest could be gauged from only a limited sample. This is worth taking into account when assessing the results. However, all the musicians sampled were fortunately able to give extensive input which is essential in understanding musician's use of instruments, attitudes and experiences. 60% of respondents were male and 40% female. The age range of musicians who completed the survey was varied and between 25 and 65 years.

2 Musical Associations

EAT produced the following typology of musician's associations (Erckens 2007):

- Professional musicians' associations
- Professional orchestras
- Woodwind ensembles
- Promoters of classical music
- Semi-professional orchestras and ensembles
- Specialist music schools
- School-related music associations
- Specialist music colleges
- University music departments
- Bagpipe and smallpipe associations

The questionnaire survey for this report showed that national and regional orchestras, symphonies and wind and pipe bands are the most common form of musical associations; 30% of respondents said they belonged to one. A further 30% belonged to other sorts of association, with music schools, chamber music associations, solo performers, military bands, folk groups and early music associations all mentioned.

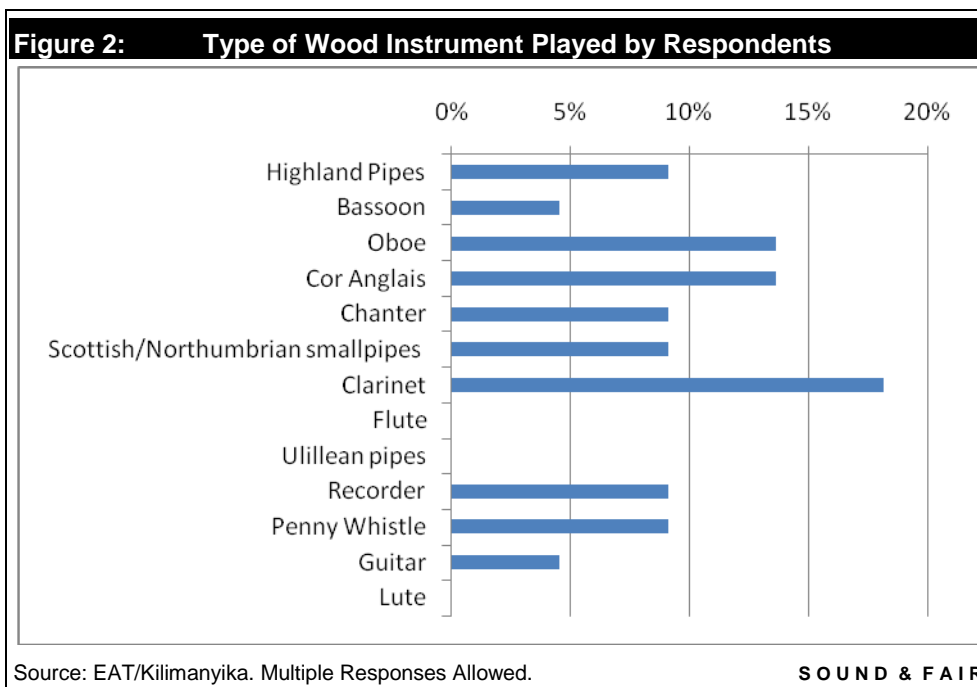


Woodwind instrument players are concentrated in national and regional symphony orchestras, conservatoires, specialist music colleges at university level (such as the Royal College of Music or the Guildhall School of Music and Drama), specialist music schools (notably Wells Cathedral School, the Purcell School and Chethams), and the junior departments (high school level) of the Royal Academy of Music, Royal College of Music, Guildhall School of Music and Drama, Birmingham Conservatoire, Trinity College of Music and the Royal Northern College of Music, Manchester. Music students are also found in more generalist university musical departments, the broader base of state and private schools that specialise in music, associations promoting musical education and professional musicians associations.

Highland pipes are played extensively in civil and military pipe bands, particularly in Scotland. Small pipes are played in pipe bands in both Scotland and the North of England in particular. Key piping institutions are the College of Piping and National Piping Centre, and the Royal Scottish Pipe Band Association.

3 *Type of Wood Instrument Played*

Of the musicians surveyed, clarinet was the most common wood instrument played (four respondents), followed by oboes and *Cor Anglais* (frequently played by the same musicians), and then Highland Pipes and the recorder players. It is not possible to say whether this is a typical make-up of consumers because of the restricted sample available; however it indicates a wide range of wood instrument players which is useful in gathering a good balance of data.



Woodwind players vary considerably in what they play but most commonly are divided between double and single reed instruments, by symphony and chamber musicians and specialists such as early music players. Nationally, highland pipes and smallpipes (and chanters) are played by a particular type of musician, largely based in Scotland and to a lesser degree, northern England.

4 Type of Materials Used

Amongst those musicians surveyed, wood was the most common, with over 80% of respondents playing instruments made from wood; the remainder use plastic instruments. (Pipes made from polypenco plastic were used by two pipe players surveyed.) Plastic recorders and clarinets are the preference of school age musicians and amateurs, and are mass market goods compared to wooden instruments. No-one from the sample played an instrument made of a wood/plastic composite. African blackwood is often used, according to the musicians surveyed, in highland pipes, oboes, *cor anglais*, chanters, smallpipes, clarinets and sometimes in recorders. All the musicians surveyed were aware that African blackwood is used to make woodwind instruments, and have instruments made of blackwood.

Table 1: Types of Wood Used – By Instrument

| | |
|----------------------------------|---|
| Highland Pipes | African Blackwood, polypenco plastic |
| Oboe | Kingwood; African blackwood; Cocobolo |
| Cor Anglais | Kingwood; African blackwood |
| Chanter | African blackwood |
| Scottish/Northumbrian smallpipes | African Blackwood, polypenco plastic |
| Clarinet | African blackwood |
| Recorder | African blackwood; Maple |
| Penny Whistle | Generally not wood, although some have a hardwood block (not usually African Blackwood) |

Source: EAT/Kilimanyika. **SOUND & FAIR**

5 Importance of Wood to the Player

Table 2 summarises the view of musicians about the use of wood instruments as opposed to plastic instruments. Instruments made of wood tend to be produced to a higher specification in all areas of the instrument including the tone holes, key mechanisms and mouthpiece. Student models are produced to a cost defined quality and thus plastic is used for the main body with cheaper medals for the keys. Plastic is airtight (although the sappy quality of blackwood also keeps instruments airtight), Whether or not this is actually the case, as some musicians argue there is no difference, plastic is believed to have an inferior resonance of sound and tone than wood.

| Table 2: Summary of Comments on Wood Versus Plastic Instruments | | |
|--|--|---|
| Instrument | Plastic | Wood |
| Bassoon | Airtight | Better quality of sound |
| Chanter | Good for practice chanter, and for pipe chanter due to wear | Best for professionals |
| Clarinet | Good for mass production | Best material; better centred and resonating sound |
| Great Highland Bagpipe | Sound lacks the warmth of wood | Preferred standard for best tonal quality |
| Oboe & Cor Anglais | | Better; beautiful, rich sound |
| Pipes | | Essential for pipe sound – rich and harmonious |
| Recorder | More reliable in variable temperatures, seems to be in tune almost immediately | Needs some time to be in tune and mouth piece more likely to block with saliva, but has better tone than most plastic recorders |

Source: EAT/Kilimanyika. SOUND & FAIR

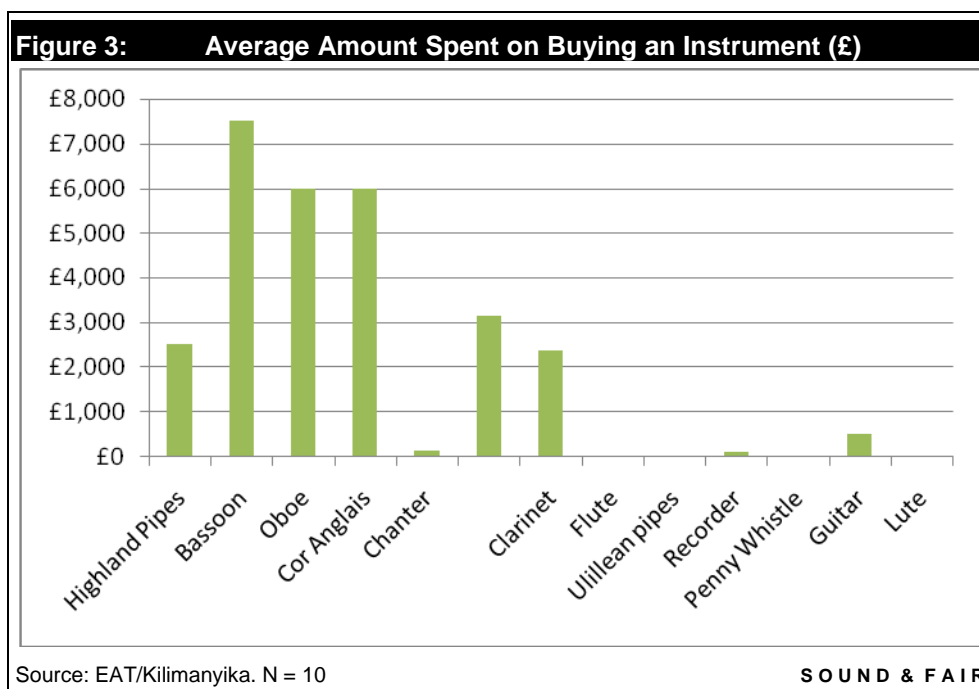
6 Importance of African blackwood

Respondents were asked, do they think instruments made of African blackwood are of better quality than other woods? Their responses, summarised, were that lignum vitae, ebony, kingswood, boxwood, rosewood and cocobolo are also excellent, although the boxwood instrument sound does not carry as far as an instrument made of blackwood, and kingswood and cocobolo are sometimes preferred because they are lighter. Primarily historical, the use of blackwood is also related to the high quality sound and its ability to adapt to changes in weather without losing its tone.

For pipers, blackwood provides a vibrant, resonant tone both for the melody portion of the instrument (pipe chanter) and the three drones which each sound only a single note, but account for a much larger amount of wood usage to make than the pipe chanter, which in fact is often of polypenco (plastic) for durability. The majority of bagpipes are fitted with a polypenco chanter; generally only the higher-ranked competition players use wood chanters as wood chanters are easily damaged. As one piper noted; “when one buys a bagpipe, one is really buying the drones”, which is why getting the right quality of sound from these is of utmost importance. Approximately 70-80 percent of the cost of the entire bagpipe is related to the three drones.

7 Amount Spent on Instruments

According to sampled musicians, an average of £7,500 is spent on a bassoon, £6000 on both oboe and *cor anglais*, £2,370 on a clarinet, £2,500 on highland bagpipes, £125 on a chanter, £3,125 on smallpipes, £90 on a recorder and £500 on a guitar.



There is a significant distinction between the market for high quality bagpipes and oboes / clarinets in terms of sale prices, as can be noted from the following retailer prices:

- Bagpipes: £468 - £2,549 (Quality Bagpipes, 2007)
- Clarinets: £1,460 – £13,776 (Howarths, 2007)
- Oboes: £2,555 - £5,725 (Howarths, 2007)

Those in the sample above are tending to purchase at the higher end of the market.

8 Long term Investments

The purchase of a premium oboe or clarinet represents a major investment and instruments are usually repaired rather than replaced. Premium quality instruments are long term investments lasting 20-40 years.

According to the sample, clarinets are the most long-lasting purchases, commonly only replaced every 21-30 years, whereas oboes and *cor anglais* are replaced every 6-10 years. Northumbrian smallpipes are said to be replaced every 1-5 years, Scottish smallpipes every 11-15 years and highland bagpipes every 21- 30 years. However, there are a range of factors involved in replacing a new instrument and the sample given here is insufficient to show any detailed trends. These factors are related to the declining quality of the instrument through wear and tear and the subsequent loss of tone, or through problems in the structure, such as cracking or loose fitting of the brass or gold ware.

Woodwind instruments tend to need more regular repair or replacement than string instruments for example because of the way in which they are played i.e. using the mouth, and the subsequent exposure to saliva causes deterioration of the instrument over time. This factor influences the market value of the instrument. Whilst bowed string instruments typically gain value with age, woodwind instruments decline in value. That African blackwood is a favourite wood for many musicians is in part due to the ability of the wood to maintain tone and good condition despite changing temperatures and moisture levels.

Because of the considerable cost of buying a new instrument, where possible, users have instruments repaired by specialists rather than buying new. An assumption made from this finding is that a significant proportion of likely buyers of new, premium oboes or clarinets will be senior students, aspiring classical musicians and recent graduates joining orchestras. Such buyers are subsequently likely to be relatively young, educated, web-users and environmentally and socially aware.

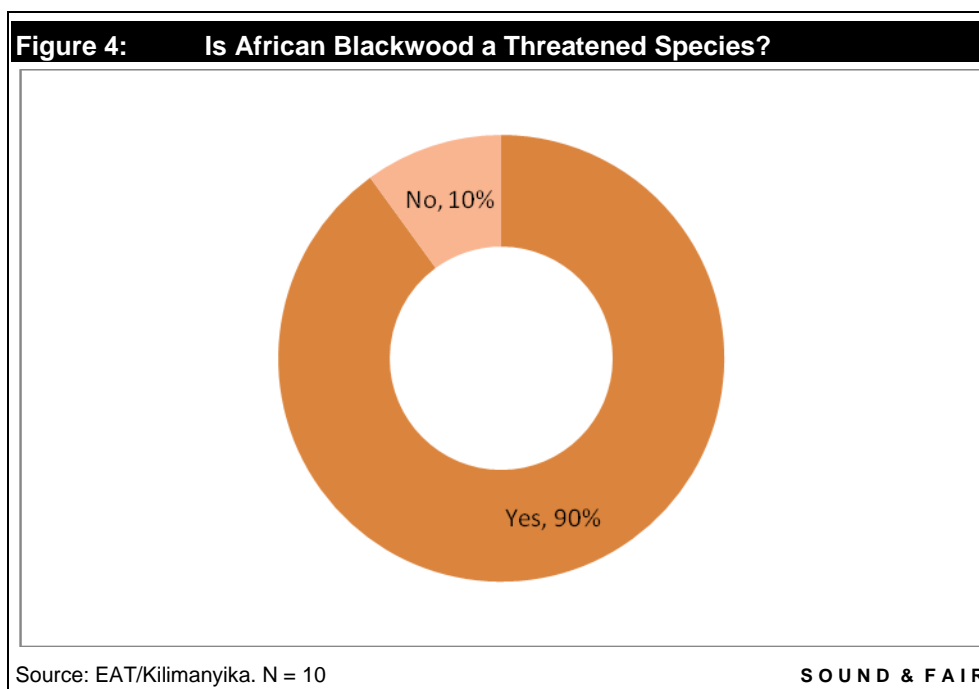
Environmental Awareness & Certification

1 *The Limited Supply of African Blackwood*

Musicians have a sense of the limited supply of blackwood. One respondent noted:

The time taken for the material to grow means that communities must have a long term interest in protecting and nurturing the trees.

89% of respondents perceive that blackwood is a threatened species, effectively acknowledging the need for its sustainable management and utilisation in future.



2 *Musicians' Views on Ethical and Sustainable Trade*

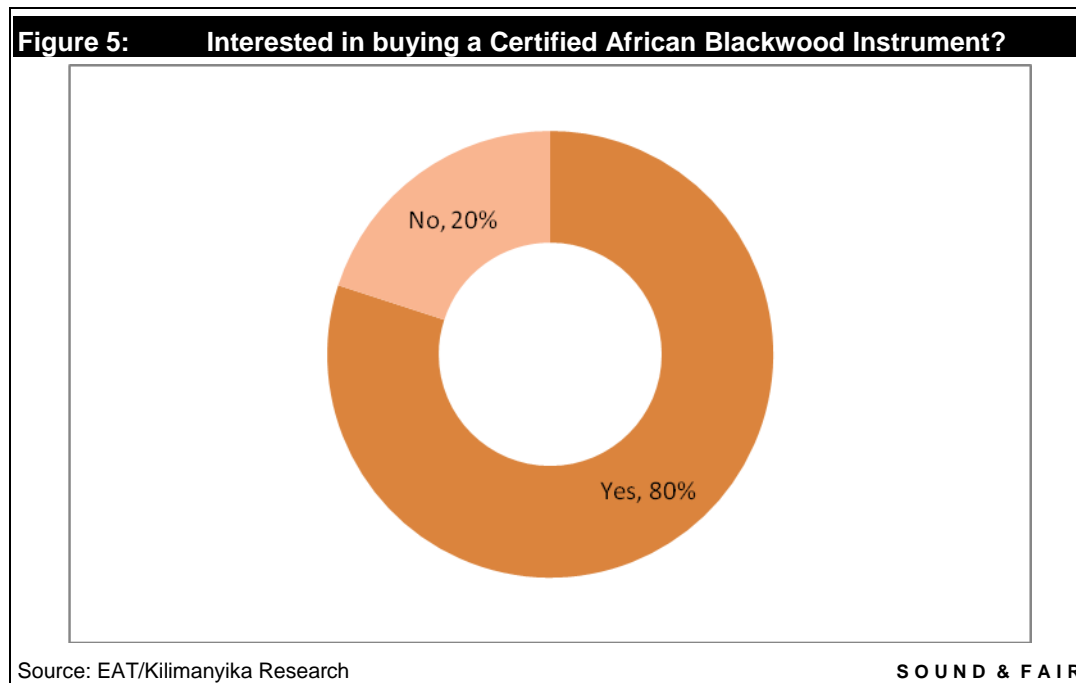
Musicians questioned were able to give a range of detailed responses as to why blackwood should be managed efficiently and harvested in a fair and sustainable manner. A consistent theme to their responses was the need “to ensure a supply in the future”.

Musicians felt that if they as a community do not trade fairly and ethically they are merely exploiting other people, who have little compared with them, and the planet. If blackwood is overused without being replaced musicians understand that ‘they’ will no longer have any blackwood left to use. They also recognise the growing climate of an eco-conscious world and the importance of sustainability for timber trade and the music industry. As one piper noted:

Hundreds of years of bagpipe manufacture and play have yielded the clear conclusion that [blackwood] is the best material and will continue to be in demand. It is necessary to subscribe to protocols that will assure the continued availability of this material, rather than turn a blind eye to short-sighted harvesting practices which may result in it no longer being available or even existing.

3 Understanding Certification

There is a strong sense from musicians that fair trade must be a right for inhabitants of countries from which we buy materials and that environmental issues, the safeguarding of wildlife habitats and the support of local communities in management of natural resources are all good reasons why musicians would buy an FSC-CAB instrument. 78% stated they were interested in buying an FSC-CAB instrument.



4 No Demand for Fair Trade – Yet

When musicians were asked if they have noticed a trend towards greater demand for ‘fair trade’ instruments, no one had heard of any trend in that direction. As there are currently no standards for fair trade in timber products this answer is not particularly surprising. Two comments given summarise this well:

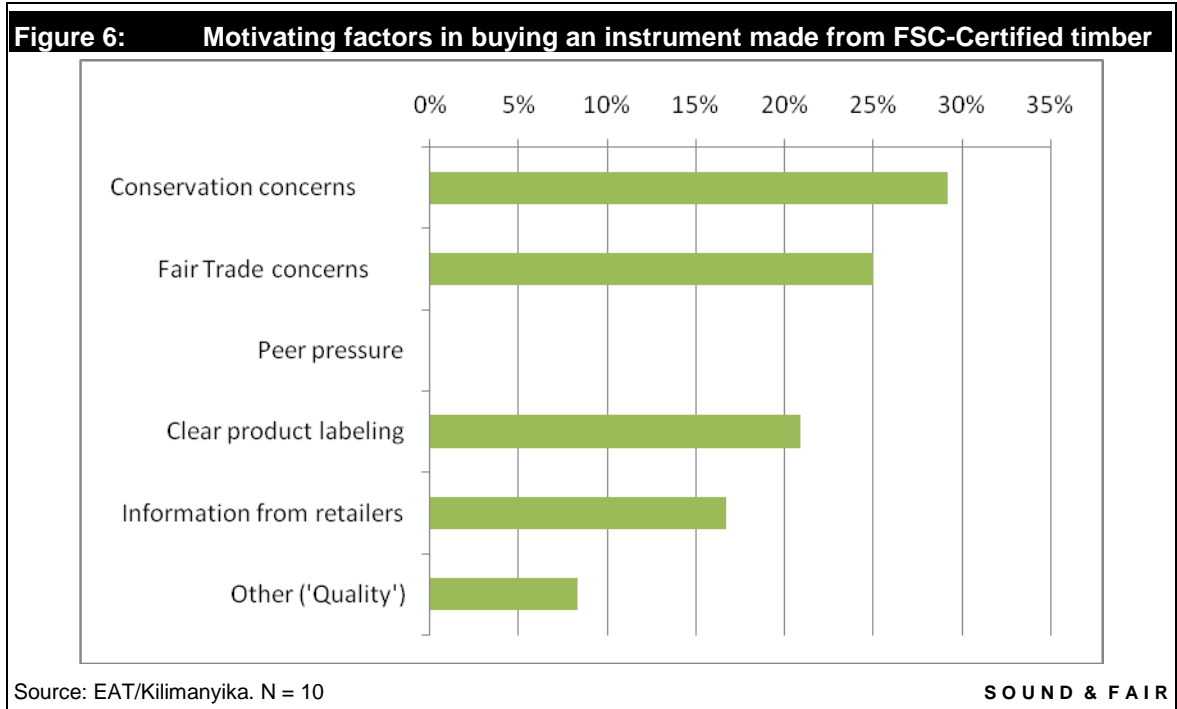
No. I have never come across this issue with musical instruments. Fair trade has up to now meant tea, coffee and chocolate, in my awareness.

No; it's not even on the radar screen of the bagpiping community. Never once have I heard such a reference to this issue raised in an online forum or elsewhere among bagpipers.

5 Motivating Factors in Buying Instruments

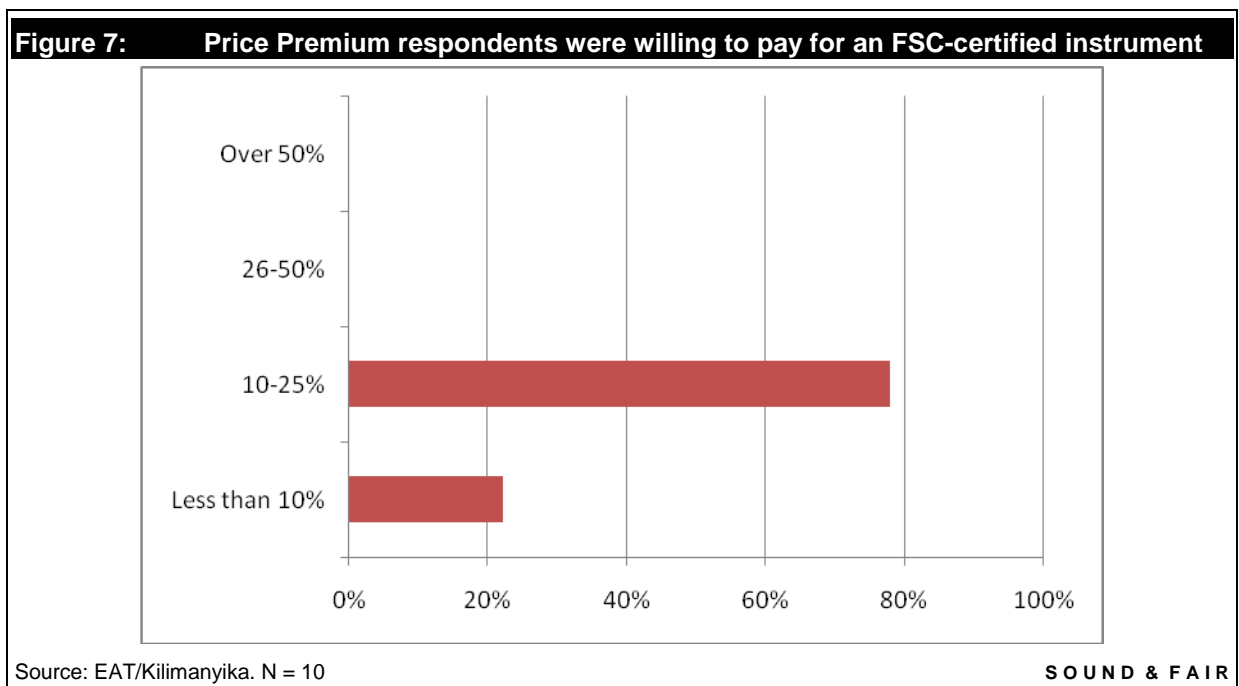
Broadly speaking, classical musicians are typically highly aesthetic people, creative yet precise in the way they play their music, and similarly so in the way in which they engage with life in general. As such, the appeal of a fairly traded, certified instrument tends to fit well with the typical musician’s personality and purchasing decisions. Ethics, moral choice and environmental sustainability are important to these consumers.

If an FSC-CAB instrument were to be available, conservation and fair trade concerns would be most the important factors of all to motivate musicians to buy one. Clear product labelling will also be important. Information, such a word of mouth stories of the FSC-CAB process, and point of sale material will also be important in persuading people to buy. Quality, as ever, will always be key to why one instrument is bought over another.



6 Pricing Issues

In the current eco-conscious consumer market, asking buyers of musical instruments to pay a small percentage price premium is a realistic proposition. Whilst musicians would not wish to pay a huge hike in price for a certified instrument, some 78% of musicians questioned stated they are willing to pay a more for a certified, fairly traded instrument, with three quarters of them indicating they would be prepared to pay a premium of between 10-25%. This has been supported in discussions with other musicians. It is also supported by retailers (Harrison 2008b). This aspect of the research is absolutely fundamental to the viability of the project. End consumers have indicated a willingness to pay the premium that is necessary to fund the FSC certified supply chain that will deliver increased incomes to forest-dependent communities.



Up to 10% was often seen as too little a price increase, while 10-25% was seen as very reasonable. However, prices must be appropriate to an instrument’s quality; as quality is the number one reason a musician will

buy their instrument, followed by aesthetics; a rise in price will have to go hand in hand with consistency in quality. Whilst most musicians spoken to stated that they would be happy to pay the extra on a certified instrument if choosing between two instruments of the same quality, a small but significant number indicated that they would only pay extra if the level of quality also rose. One thing is certain, whatever the price rise, the quality of the product is most important.

A price premium on the expensive, top end of the oboe and clarinet market has the greatest potential for generating benefits for producer communities (Harrison, 2008a). Channelling the limited supplies of FSC-CAB to manufacturers of top end instruments has the potential to generate greater benefits for producer communities than if supplies are given to manufacturers of less expensive instruments. Given the restricted supply of FSC-CAB, the priority must be to feed available timber into the production of premium quality, expensively priced instruments at the top end of the market.

Understanding Fair & Sustainable Trade

1 *Growth of Ethical Markets*

The ethical/fair trade market is ‘exploding’ (Duncan White, *pers comm.*) and green labelling becoming increasingly important to market players and consumers. Consumer awareness of ethical and fair trade is growing all the time. There have been a number of key milestones such as the choice of Marks and Spencer’s (M&S) to only sell Fairtrade coffee in late 2005. Indeed, Fairtrade coffee is now a relatively mature market, with 20-25% of roast and ground sales in the UK being Fairtrade.

The growth in demand for Fairtrade products is forcing suppliers to reassess their strategies across a whole range of markets. The Fairtrade Foundation has been seeing a huge growth in sales across their product range of approximately 50% year on year (Duncan White, *pers comm.*).

Moving away from the increasingly established Fairtrade markets of food and beverages, the Fairtrade Foundation has started to produce Fairtrade cotton with the support of retailer Marks & Spencer’s. A growing interest lies in bringing Fair Trade principles to the timber markets although this is some way off as yet. According to the Fairtrade Foundation, at present there are no FLO standards in development in this area, whilst on the issue of handcrafted products the Fairtrade Foundation currently refer people to the International Federation of Alternative Trade (IFAT) network which is where most of the fair trade organisations involved in artisanal crafts try to work together (Barbara Crowther, *pers comm.*).

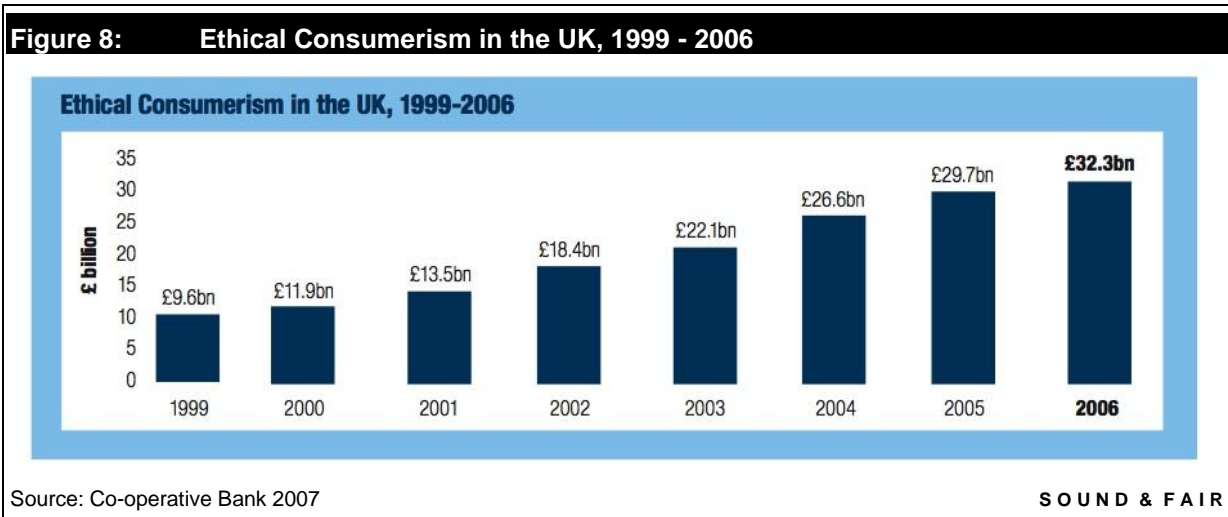
The kind of person attracted to fair trade and other ethical products varies according to the product itself. In food and beverages, women of the socio-economic category ABC1 (affluent, middle class) are the most dedicated fair trade shoppers, especially those aged between 24 and 34 years of age (Duncan White, *pers. comm.*). If the volumes and the economics are right, a fair trade product can be targeted across low, mid and top-end brackets within a range of market segments, such as at the low end (with other products selling at 30p for example), or in the middle-range (selling at £1 with others of the same bracket), or at a premium or quality brackets for £2 for example. This is possible with many (but not all) Fairtrade products because of the economies of scale involved. With a highly specialised timber-made musical instrument this is a different case, partly because of economies of scale and the niche nature of the market.

Successful marketing of ethical or fair trade products requires a focus on the target consumers, and their wants and needs, ensuring the product meets all functional and quality requirements as well as ethical ones. Maintaining the integrity of the ethical brand is also essential; providing true sustainability, both economic and ecological.

2 *The Market for Ethical Consumer Products*

Strong demand exists for FSC-certified, Fairtrade and other ethical products, sold with a price premium, especially at the top end of the market. A product’s provenance and added value is a selling point. Consumers, especially of premium and luxury products are making buying decisions on a product’s eco-value (Nicholls & Opal, 2005).

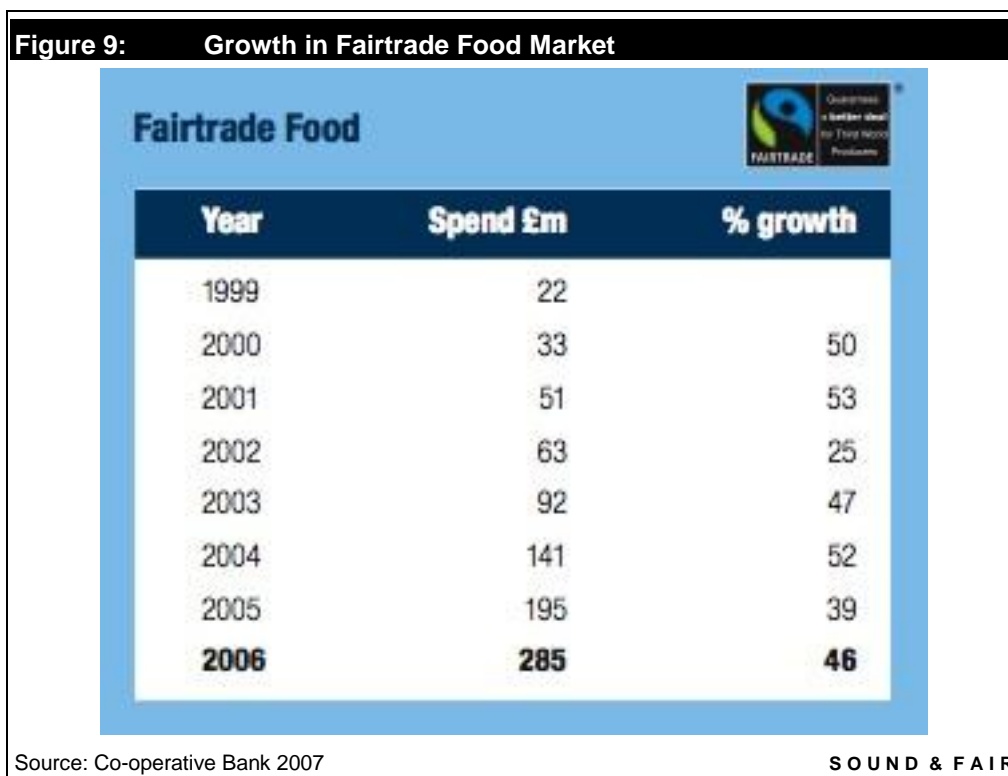
The Co-operative Bank’s Ethical Consumerism Report 2007 found that household expenditure on ethical goods and services has almost doubled in the past 5 years, with the total market valued at £32.3 billion in 2006.



With strong demand for ethical products, manufacturers of consumer goods are increasing the range of supply. This can be seen across the consumer spectrum from the widespread availability of organic, fair trade chocolate and coffee, to the introduction of organic cotton by clothes manufacturers and car manufacturers launching lower-emission hybrids (Co-operative Bank 2007; Moore *et al.* 2006).

“Consumers are steadily becoming more aware and retailers know they have to respond.”
 (Kathy Child, Senior Retail Analyst at Mintel, - The Ecologist, October 2007)

The growth in the market for Fairtrade products has been particularly spectacular with a 46% increase from 2005 to 2006, and the annual value of the Fairtrade product market has seen an increase of over 1,000% increase since 1999.



The massive growth in the market for Marine Stewardship Council (MSC) certified fish is particularly interesting with reference to FSC-CAB and demonstrates the potential when a product is positioned and marketed in the right way. MSC is similar to FSC in that it certifies sustainable fish stocks with products from MSC-certified fisheries being tagged with the MSC stamp and sold with a significant price premium. The market for MSC fish increased by 224% between 2006 and 2007 (The Co-operative Bank 2007) and

Marks & Spencer have announced that all of its fish will come from MSC-certified sources by 2012 (MSC 2007).

Musical instrument manufacturers are becoming aware of eco-marketing opportunities as exemplified by Gibson Guitar's recent partnership with Live Earth that saw the production and auction of 25 FSC-certified guitars. Such opportunities provide manufacturers with valuable PR material as Henry Juskiewicz, Chairman and CEO of Gibson Guitar explains:

Gibson Guitar finds it a privilege to work with Live Earth to combat global warming as the event's official partner," Gibson Guitar, and its philanthropic arm, Gibson Foundation, are dedicated to supporting the cause for climate protection and the creation of these environmentally friendly guitars. (FSC 2007a)

3 *Ethical and Eco Branding*

The growth of ethical and fair trade markets does not simply reflect a growth in altruism. Many players in the market see it as an opportunity to rebrand themselves without necessarily going through the hoops in terms of supporting their suppliers in developing countries nor, in the case of green labels, improving the natural environments in which the products are grown. There are essentially two types of 'fair trade' products on the market, those with genuine ethics that can prove the *traceability* of an ethical product down to the roots of the supply, and those that can get away with a "whitewash". Different rules and different labels dictate the degree to which a product can be verified as fairly or ethically traded.

Traceability is important. People are increasingly interested in where their food has come from. However there is a lot more to fair trade than tracing origins, it's also about knowing that products were bought at a fair price at the farm gate. (Richard Anstead, Fairtrade Foundation, pers. comm.)

Siegle (2008) in the UK's Observer newspaper (13th January 2008), summarised well current trends in ethical and eco labelling. Siegle remarked on the confusing array of ethical and eco-labels in which the EU has defined three types.

- Type 1: Based on criteria selected by an independent third party
- Type 2: Based on self-declarations by a manufacturer or retailer
- Type 3: Based on life-cycle assessments of a product or service verified by a third party

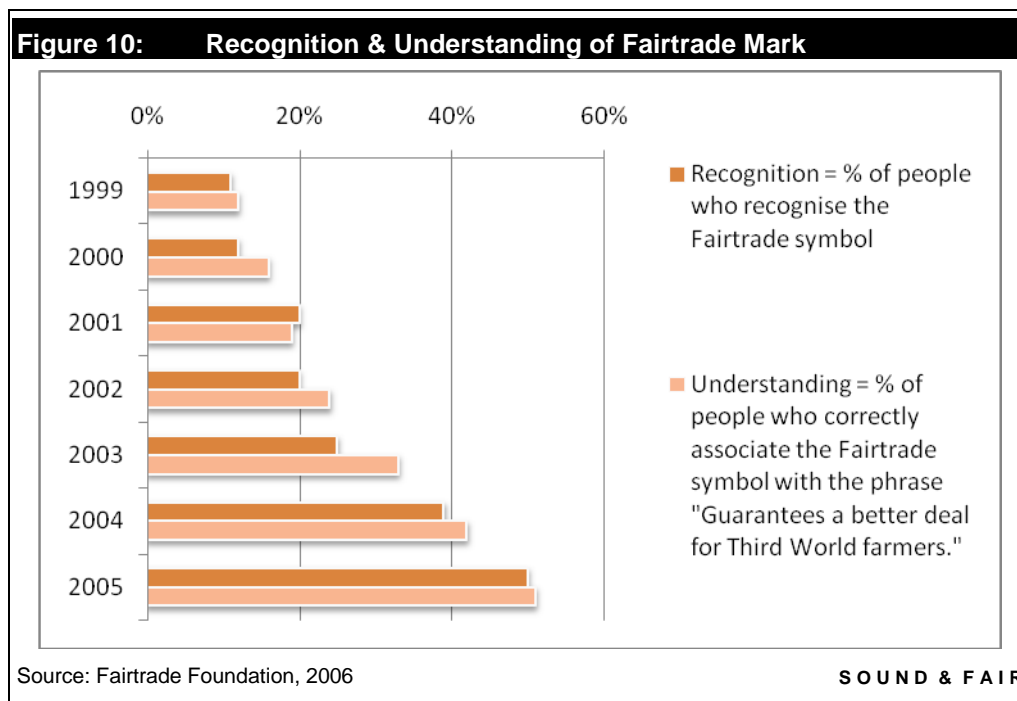
The fact that it is possible to have both private ethical/eco-labels and independently verified labels within one market is confusing for the consumer. Without detailed research it is difficult to see whether the label is simply a marketing gimmick or a verification of an ethical and/or ecologically sound product by an independent third party. As Siegle alluded to in her article, the incidence of the self-declared labels will increase consumer fatigue and cynicism.

However, the rising importance of the third party labels, supported by an increasingly vigilant consumer body overall, will see the longer term phase-out of Type 2 labels in favour of Type 3 because the use of the latter type will be seen as the all important badge of quality, ethics and ecological sustainability. Manufacturers and retailers won't want to sell a product without a Type 3 label, consumers won't think of buying otherwise. In the meantime, a great deal of awareness raising of the importance of the Type 3 labelling systems, alongside associated investments in ethical and sustainable product life cycles is still required.

Labelling will also need to reflect more clearly the distinction between ethical labels, which are rooted in economic development for the poor, human rights and animal cruelty issues, and ecological labels which are rooted to the sustainability of natural resources, species, habitats and the environment in general. Currently, in terms of the Type 3 labels, Fairtrade, Rugmark and the Vegan Society are the better known ethical labels, while FSC, MSC, Soil Association, Energy Saving Trust and the EU's Energy Label are well known eco-labels.

4 *The Fairtrade Brand*

The Fairtrade symbol has developed considerable brand recognition over the past eight years. Siegle (2008) noted the enviable position that the Fairtrade Foundation has achieved, when in a 2005 Mori poll, 50% of the UK adult population were able to identify its mark. 51% of people were able to correctly associate the Fairtrade symbol with the phrase “guarantees a better deal for third world farmers”.



Fairtrade Foundation figures show increasing consumer recognition of the brand. The demographic of Fairtrade shoppers is also becoming broader and includes consumers from across the age, gender and socio-economic spectrum.

Looking at their figures in more detail, ‘prompted recognition’ saw an overall rise from 39% in 2004 to 50% in 2005. Women are still slightly ahead of men in terms of brand recognition (52% : 49%) but the gap has narrowed. Notably, in socio-economic terminology, two-thirds of those who recognised the brand are in the affluent AB category (64%), but C1s are growing fast (up from 40% to 57%). In terms of age ranges, 25-34 year olds (55%) were as likely to recognise the brand in 2005 as 45-54 year-olds (54%); under-25s were a little behind (45%).

Fair Trade Shoppers are equally women and men, both with children and without. Those most likely to ever buy are between 45-54 years old (84%), from AB background (83%) and broadsheet readers (89%), or ‘activist’ types (93%). C1 category shoppers and 25-44 year olds are not far behind (all 80%).

The importance of the Fairtrade mark in terms of what it means and stands for has also grown. In 2005, 83% said the Fairtrade mark was either ‘very’ (41%) or ‘fairly’ (43%) important as an independent guarantee. The most weight placed on this guarantee is that made by 25-34 year olds and those regularly purchasing, 52% of whom said it is ‘very’ important, rather than ‘fairly’ important (Fairtrade Foundation, 2006).

5 *The FSC Brand*

Although less widely recognised as a consumer brand, FSC’s certification principles are widely acknowledged in the industry as a international quality standard in the management and supply of documented and sustainably produced timber. Environmental sustainability pledges along with the associated additional costs of management and chain of custody administration are often expected to be able to generate a price premium as certified products move towards the consumer. However, in many cases, the price premium for FSC-certified timber is small, and the greater benefit is in market access, with more and

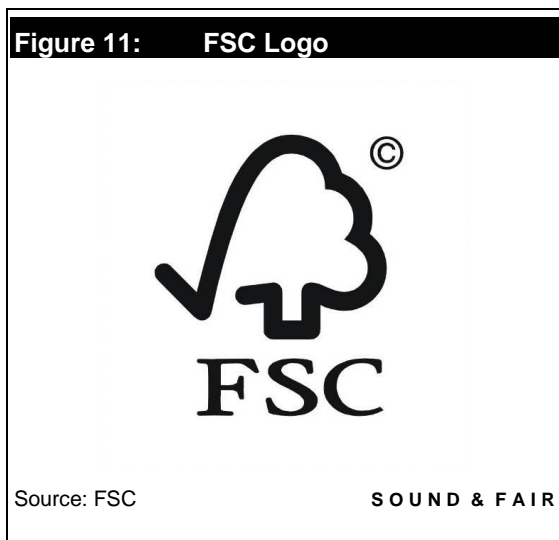
more market segments being closed off to non-certified produce, though other certification schemes may be accepted (Kevin Jones *pers. comm.*).

Like Fairtrade, FSC is steadily growing into a major worldwide brand. Over US\$5 billion worth of raw, semi-finished and finished wood and paper products originating in FSC-certified forests and bearing the FSC logo were sold in 2004/5 and more than 10% of commercial forests worldwide are certified as well-managed according to FSC principles. However, most of these are plantations in developed countries than natural forest in tropical countries which were the initial goal of FSC's founders. Like other ethical products, the brand is expanding rapidly with a 67% increase in FSC products sold in the three years to 2004 (FSC 2005).

In the UK, growth has been even more spectacular with over 80% of UK grown timber now covered by the FSC programme. However, brand recognition is lagging behind considerably and a FSC-UK commissioned survey found that just 19% of consumers had seen the FSC logo; not all of whom will have identified and/or

understood what the brand represented (FSC 2007). A Timber Trades Federation report also reported that low demand and interest from consumers represented a major obstacle to the expansion of the supply of verified legal and sustainable timber (TTF 2006).

Clearly, the FSC brand requires significant investment and time before it is as well recognised as the Fairtrade brand. According to the Fairtrade Foundation, 57% of UK adults now recognise the Fairtrade mark (Co-operative Bank 2007). However, the brand is growing rapidly and in the current climate of increased environmental awareness and ethical consumerism, FSC brand recognition can be expected to grow accordingly.



6 Linking FSC to FLO

In 2007 an IIED report brought together both the FLO and FSC amongst other partners to discuss the options of fair trade standards for timber products and the alignment with the certification process:

Recent analyses suggest that it is small enterprises, especially those democratically managed by communities, which address the broader dimension of poverty. They accrue wealth locally and secure local forest access (thereby reducing tensions that come from external interference in resource use). They foster local entrepreneurship and often participate in and strengthen local associations with strong social and environmental aims. They usually respect local cultural traditions and can help to build local environmental knowledge and accountability. Fair trade has made great progress in supporting small community enterprises in developing countries but with little involvement in the forest sector until now. There is scope to do more with the complementary foundations of forest certification and fair trade in support of community forest producers. (Macqueen et al., 2007)

The Macqueen report looked at opportunities to distinguish and reward community forest enterprises in the market. Their main conclusions were that there is significant demand for a mechanism to credibly distinguish community forest products in the market. This demand stems from international and national buyers groups, and from community forest producers themselves (Macqueen et al., 2007).

Their report also states that there are two critical pre-requisites for success in trading timber products from community-managed forests:

- Form strong community business organisations
- Develop community forest management and business capacity over time

They argue that “the experience of the fair trade movement in addressing these issues makes it logical to build better links between forestry and fair trade” and developed a dialogue which involved representatives from both FSC and FLO. They concluded that:

There is nothing intrinsically impossible about FSC and FLO working together to develop a mechanism for distinguishing community forest products. Indeed, there is much to recommend it. FSC even have a strategic mandate to do just that. What is needed now is for FLO to assess whether the development of a standard for fair trade timber is in its strategic best interest – and if not, how FSC might best be supported to develop such a mechanism on its own...The current status of community forestry and the institutional momentum behind the development of a mechanism to distinguish community forest products in the market represents a historic opportunity...[which] should be seized with both hands. (Macqueen et al., 2007)

The link between the environmental quality controls of FSC and the social development quality controls of FLO is thus seen to have considerable potential, and while as yet there is no combined standard for fairly traded timber products, it is likely that there will be in the near future.

Sound & Fair: Development of a ‘Shadow Brand’

The growing strength, recognition and understanding of the Fairtrade brand is a consequence of the constant development of Fairtrade products and the increased faith in this as a viable alternative to mainstream products. It is also a consequence of a huge increase in consumer awareness of the difference between what fair trade products mean in terms of profits for developing world producer communities compared to other products and an increasing ethical awareness undercurrent amongst UK shoppers. The growing awareness of FSC and the considerable respect for the organisation suggests that people will support FSC-CAB. The increasing consumer demand for Type 3 labelling by a certified third party will give increasing credence to this approach.

However, fair trade timber is not yet a reality. Additionally, the FSC brand may not yet have sufficient resonance with the general public to support this project over any other. Consideration needs to be given to the value of adding a supportive, strengthening, distinctive and discriminating “handle”. It is proposed that an additional descriptor be used, with the suggestion that it be the “sound and fair” label, being developed to work in the meantime as a ‘shadow brand’. The manufacturer should be shown that they can use the ‘shadow brand’ all the way up the supply chain through the retailer to the consumer. The manufacturers need to be sold a story about where the wood comes from to boost their incentive and interest, a story in which they become a part and which is passed on to the consumer. If the shadow brand is successful, other manufacturers and retailers will copy their competitors and the market will quickly grow and mature. The shadow brand would be retailed as a Type 2 label, attached, assuming the relationship can be assured, with the Type 3 label of the FSC alongside.

Success will be related to focusing on the target consumers, ensuring the quality of the product, ensuring it is consistent in supply, pricing and quantity and ensuring the integrity of the brand – true sustainability, both economic and ecological.



‘Sound and Fair’ has been chosen to convey the link between music and ethical considerations. ‘Sound’ reflects both the strong musical theme that is resonant with the musician and the ‘environmentally sound’ process of certification. ‘Fair’ reflects the objective of fair trade achieved through PFM – the community forest management programme - and supported through certification.

Discussion and Recommendations

This report, makes the following recommendations.

The purchase of a premium oboe or clarinet represents a major investment and instruments are usually repaired rather than replaced, but the wear and tear on woodwind means they are replaced more regularly than, say, string instruments. Buying a musical instrument is, in retailing parlance, a 'wants' rather than a 'needs' purchase. Typically the need for a functional instrument is outweighed by the aspirational aspect of buying an instrument, a purchase that makes the musician feel that not only are they investing in quality, and they are improving themselves and benefiting their audiences by paying extra for a better product.

Linked to this is the critical issue of quality. It is clear from this research that to reach the requirements of a musician, particularly above the amateur level, a fairly traded, certified product will not be enough to sway the potential buyer. The most important factor in deciding on a purchase is not its price, nor the origins of the wood, nor the social and ecological impact, but the intrinsic quality of the instrument itself.

Qualities of sound, of feel, of function, and of material are all essential to the buyer. Yet if the quality aspirations and requirements of the consumer can be met, strong demand exists for FSC-certified, Fairtrade and other ethical products, sold with a price premium, especially at the top end of the market. Consumers generally are increasingly making buying decisions on a product's 'eco-value', especially for premium and luxury products, and FSC-certified instruments would fit well into this picture. However, the instrument manufacturer and the related quality issues are typically more important than the choice of wood used.

In the current eco-conscious consumer market, asking buyers of musical instruments to pay a significant price premium is a realistic proposition. A price premium on the expensive, top end of the oboe and clarinet market has the greatest potential for generating benefits for producer communities. Maintaining the highest degree of quality of product will thus be essential if a niche product is to be marketed. The market for fairly traded, FSC certified African blackwood instruments (FSC-CAB) will be greatest at the high end of the woodwind market. As blackwood is considered the highest quality wood, and wood in turn is considered to be of higher quality than plastic, keeping that attention to quality and premium will not be a hard sell, thus FSC-CAB will take a natural place at the high-end providing timber conditions and instrument manufacturer are to the highest levels of quality. An ideal premium of 10% is suggested, which would indicate a high-end product only. Because consumers are willing to pay, this could go up to as much as 25% on the standard retail price, however it is unlikely to be competitive if it does.

By paying a small price premium buyers of musical instruments can make a real difference to the lives of some of the poorest people on earth. Effectively communicating the benefits for producer communities to consumers will be essential in achieving consumer willingness to pay the price premium.

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Appendix 1: List of Musical Associations¹

1 Professional Musicians' Associations

Royal Philharmonic Society

They have a foundation which gives grants to help aspiring professional musicians to purchase better quality instruments.

SAMA - Scottish Amateur Music Association

Was founded in 1956 and offers the amateur musician the opportunity to gain experience in string orchestras, wind and brass bands by way of national training courses.

Jewish Music Institute

The Jewish Music Institute is dedicated to the celebration, preservation and development of the living heritage of Jewish music for the benefit of all.

Music Education Council

The Music Education Council exists to bring together and provide a forum for those organisations to debate issues affecting music education and to make representation and promote appropriate action at local, national and international level.

The Associated Board of the Royal Schools of Music

World provider of graded music examinations, trusted and respected by teachers and candidates alike worldwide.

British Arts Festivals Association

Directory of leading professional arts festivals in the UK, from street theatre to opera

British Music Information Centre

The resource centre for contemporary classical British music.

Orchestras Live

Is the UK's leading development agency for professional orchestral music.

The English Music Festival

English music festival devoted to promoting the neglected music of both well-known and lesser-known British composers.

Incorporated Society of Musicians Home

The ISM is the UK's professional association for musicians and music teachers.

Musicians Benevolent Fund

The Musicians Benevolent Fund is the music business's own charity - the largest in the UK, funded entirely by donations and bequests from music lovers and musicians.

Musicians Union

This union represents over thirty thousand musicians working in all sectors of the music business.

2 Professional Orchestras

Association of British Orchestras

The national body representing the collective interests of professional orchestras throughout the UK.

Academy of Ancient Music

¹ Kindly reproduced in full from Erckens, V (2007) Research for Environment Africa Trust

Among the world's first and foremost period-instrument orchestras, the Academy of Ancient Music is renowned for its exhilarating live performances and innovative programming:

Academy of St Martin in the Fields

The Academy of St Martin in the Fields is the English chamber orchestra.

Ambache Chamber Orchestra

The Ambache has been established for 20 years and maintains an impressive history of performance and recording. The group of between three and thirty players includes many of this country's leading chamber musicians.

BBC Concert Orchestra

The BBC Concert Orchestra is one of six BBC performing groups which all have their own unique character.

BBC National Orchestra of Wales

The BBC National Orchestra of Wales occupies a very special role as both a national and broadcasting orchestra, acclaimed not only for the quality of its performances but also for its importance within its own community.

BBC Philharmonic Orchestra

The BBC Philharmonic is Manchester's international broadcasting orchestra, and has been established on the international stage for 70 years.

BBC Singers

BBC Singers

BBC Scottish Symphony Orchestra

The BBC Scottish Symphony Orchestra is one of Britain's busiest orchestras, with a huge repertoire ranging from the most complex modern scores to the great classics, from music for film and TV to new music by Scottish composers.

BBC Symphony Orchestra

The BBC Symphony Orchestra plays a central role at the heart of British musical life. It acts as the flagship orchestra of the BBC Proms, with a number of appearances each year including the First and Last Nights.

Birmingham Contemporary Music Group

BCMG was formed in 1987 from within the City of Birmingham Symphony Orchestra and is established as one of Europe's leading ensembles.

Birmingham Royal Ballet / Royal Ballet Sinfonia

As the most regularly contracted ballet orchestra in the country, the Royal Ballet Sinfonia enjoys a full touring schedule. It appears with Birmingham Royal Ballet in its home town, in London and around the UK, and it frequently accompanies The Royal Ballet both in London and overseas.

Bournemouth Symphony Orchestra

With over a century of musical achievements, the Bournemouth Symphony Orchestra enjoys world-class status with a tradition of excellence and innovation, and a long history of performance in the concert halls of England and the world.

Brighton Philharmonic Orchestra

The orchestra gives an annual season of concerts in the Brighton Dome Concert Hall where it regularly reaches a capacity audience, and with over 700 Season Ticket holders it has one of the largest and most enthusiastic fan bases in the country.

Britten Sinfonia

Regarded as one of the UK's most energetic and innovative ensembles, Britten Sinfonia features a collection of the UK's most talented and creative musicians, many with solo careers.

City of London Sinfonia

CLS performs over 100 concerts a year at many of the UK's leading festivals and concert venues, as well as touring abroad and giving regular radio broadcasts.

English Baroque Soloists

The English Baroque Soloists is a period instrument chamber orchestra of outstanding distinction, and has established itself as one of the great orchestras in the world, with a strong reputation as a Mozart orchestra.

English Classical Players

With a playing strength of between 18 and 70, and taking technical brilliance for granted, the orchestra aims to bring not just a real sense of passion and commitment to its live performances but a sense of artistic exploration and creativity too.

English National Opera

Britain's only full-time repertory opera company, based near Covent Garden. Includes a diary of what's on and booking information

Ensemble Cymru

Ensemble Cymru exists to benefit the people of Wales by means of performance of chamber music and chamber orchestra music by practitioners skilled in performing to and communicating with their audiences.

Gabrieli Consort & Players

Early music ensemble, specialised in sacred music involving instrumentalists and vocalists. Performances

Guildford Philharmonic Orchestra

They have a huge variety of professional music making to enjoy, from the Renaissance to the present day, in venues ranging from the classic Elizabethan architecture of Loseley House to the elegant lightness and space of Guildford Cathedral.

Hallé Orchestra

Britain's longest-established professional symphony orchestra

Lancashire Sinfonietta

The Lancashire Sinfonietta is an outstanding and unique chamber orchestra with a mission to educate, entertain and inspire communities in Lancashire.

London Sinfonietta

Leading Contemporary Music Ensemble

London Handel Orchestra

The London Handel Festival has contributed to a Handel revival in the UK, specialising in the performance of lesser-known works of the period.

London Mozart Players

The London Mozart Players is one of the most respected chamber orchestras in Europe, and is also the oldest in the UK

London Philharmonic Orchestra

The London Philharmonic Orchestra performs music to the highest artistic standards for the broadest possible audience.

Manchester Camerata

Chamber orchestra based in Manchester

Milton Keynes City Orchestra

The Milton Keynes City Orchestra has, over more than 25 years, built a national and international reputation through performances of outstanding quality.

New London Orchestra

The New London Orchestra is a dynamic, flexible and forward-thinking organisation with flair and imagination.

Northern Chamber Orchestra

The Northern Chamber Orchestra has gained a formidable reputation from its engaging and exciting concerts.

Orchestra da Camera

Orchestra da Camera performs the rich chamber music repertoire and is one of England's most senior chamber orchestras.

Oxford Philomusica

Oxford Philomusica is the country's fastest growing professional symphony orchestra, and its residency at Oxford University makes it unique amongst British orchestras.

Philharmonia Orchestra

The Philharmonia Orchestra is acknowledged as one of the world's great orchestras.

Royal Liverpool Philharmonic

The Royal Liverpool Philharmonic is one of the oldest concert-giving organisations in the world, and the second oldest in Britain.

Royal Philharmonic Orchestra

The Royal Philharmonic Orchestra has established a world-wide reputation for music-making.

Royal Scottish National Orchestra

The Royal Scottish National Orchestra is one of Europe's leading symphony orchestras.

Scottish Chamber Orchestra

The Scottish Chamber Orchestra is one of Scotland's four national performing arts companies and is dedicated to the performance, creation and appreciation of music throughout the country.

Southbank Sinfonia

Southbank Sinfonia is Britain's newest orchestra and one of the most exciting projects in music for decades.

Ulster Orchestra

Ulster Orchestra is Northern Ireland's only professional symphony orchestra.

3 *Wind Ensembles*

Blast from the past

The members of "A Blast From the Past" will be performing pieces from the Light Classical, Jazz, and Popular styles of music. Each of us plays Clarinet, Flute and Saxophone within the ensemble.

Bloomsbury Woodwind Ensemble

The ensemble provides adult amateur woodwind players with the opportunity to promote and develop their musical ability and ensemble skills in a relaxed and informal setting, to build a varied repertoire of woodwind ensemble music, and to perform in public.

Barnet Band

The Barnet Band is a community wind band based in Barnet, north London.

Beckenham Concert Band

They are a friendly community band made up of players of different ages, backgrounds and interests located in the London Borough of Bromley.

Bromley Concert Band

The band gives around ten public concerts per year, drawing upon an extensive repertoire and embracing many distinct styles and genres.

Burnham Concert Band

They play every style of music including opera, classical, modern classics as well as compilations and show tunes.

Central Band of the Royal British Legion

The Central Band is the premier and flagship band of The Royal British Legion.

Chalfont Wind Band

The band's aim is to encourage the interest of wind band musicians of any age and to give them plenty of experience of playing in public.

Harrow Concert Band

They offer an opportunity for wind players (flutes, oboes, clarinets, bassoons, saxophones, horns, trumpets, trombones, tubas) and percussionists from all backgrounds and of all capabilities to practise and perform a wide variety of music in an informal and friendly atmosphere.

New Redbridge Wind Orchestra

This orchestra deliver concerts of a high musical standard but to have fun and enjoy our music-making along the way.

Symphonic Wind Orchestra of North London

SWON is an enthusiastic and friendly wind orchestra based in the East Finchley and Muswell Hill area of North London.

The Gallimaufry Ensemble

They perform in a variety of combinations, from duets to sextets and have recorded Sir Harrison Birtwistle's Five Distances for Five Instruments for the Academy's own CD label.

The Palatine Wind Quintet

The Quintet gives several concerts a year for music societies and charities and for diverse events such as festivals, conferences and garden open days. T

4 *Classical Music Promoters*

Raymond Gubbay

Raymond Gubbay provides classical concert tickets, opera, orchestra concert and ballet tickets for concert venues in the UK.

Ensemble Productions

Ensemble Productions produces and promotes classical concert music

5 *Semi-professional Orchestras and Ensembles*

AD Concert Band

The aim of this band is to provide an opportunity for musicians of all ages and abilities to make music together and to bring the enjoyment wind band music to a wide range of audiences.

Alderley Edge Orchestra

The Alderley Edge Orchestra is one of the friendliest in the North West of England.

Birmingham Concert Orchestra

Birmingham's oldest amateur orchestra, giving three concerts each year in aid of local charities.

Bolton Chamber Orchestra

The BCO is an amateur orchestra that has been performing in Bolton for over 40 years.

Gloucestershire Symphony Orchestra

Gloucestershire Symphony Orchestra plays classical music from all musical eras, including modern works and first performances by local composers.

Gorton Philharmonic Orchestra

Gorton Philharmonic Orchestra is an amateur symphony orchestra, believed to be oldest orchestra in Manchester.

Hale Light Orchestra

They are a group of amateur musicians, based in the village of Hale.

Harmonie Concert Band

Harmonie is a Solihull wind band with a long and successful history of providing the opportunity for players to rehearse and perform concerts.

High Peak Orchestra

The Orchestra is noted for its friendly and welcoming atmosphere.

Kensington Philharmonic

This is one of London's leading amateur orchestras. It provides opportunities for advanced players to study and perform works from the classical and modern repertoire, including pieces that are rarely heard in the concert hall.

King Edward Musical Society

Amateur orchestra and choir in Macclesfield, Cheshire. Information on concerts, rehearsals and workshops.

Manchester Beethoven Orchestra

Manchester Beethoven Orchestra is an amateur orchestra giving concerts for Charity in Manchester.

Oldham Symphony Orchestra

The music is varied, with classical favourites interspersed with some challenging (usually to play rather than to listen to!) more contemporary works.

Salford Symphony Orchestra

The Salford Symphony Orchestra is an amateur orchestra based in the Salford area.

Stourbridge Choral & Orchestral Society

The Society is an amateur society giving performances of choral and orchestral music. It was founded in 1884, and is one of the oldest choral and orchestral societies in England.

The Durham Sinfonia Orchestra

The Durham Sinfonia Orchestra is a semi-professional orchestra which has given many major concerts over the years.

The Stockport Symphony Orchestra

Although most players are relatively local, a significant minority travel from as far as north Lancashire and the Potteries, attracted by the orchestra's reputation for diversity of repertoire and high standard of performance.

Wilmslow Symphony Orchestra

They are a large amateur orchestra aspiring to high musical standards.

6 *Specialist Music High Schools*

Alderbrook School

Alderbrook School is a successful, 11-16 Comprehensive school situated in Solihull, West Midlands, UK.

Bridgewater Arts High School

They became a Performing Arts College in 1998 under the Government's Specialist Schools Initiative.

Canon Lee School

This is a specialist music high school in York.

Castle Vale School and Specialist Performing Arts College

This school has a strong tradition of supporting students to success in the East of Birmingham and particularly on Castle Vale.

Chethams Music School, Manchester

An elite music high school

Charles Edward Brooke School

Charles Edward Brooke School will support each student in developing her talents in a stimulating, secure environment based on Christian principles.

Don Valley School and Performing Arts College

Don Valley is now a Specialist College in Performing Arts. This means that the school will specialise in the subjects of Music, English and Drama.

Falinge Park High School

Their goal is to unlock the potential of all their students and staff who work together at Falinge Park High School and Performing Arts College.

Formby High School

They have a long tradition of academic excellence at the school and intend to build on this in the future.

Fulwood High School & Arts College

At Fulwood High School and Arts College they work in close partnership with parents to promote the development of young people in every aspect of their lives.

Glenthorne High School

This is a specialist music high school in Sutton..

Great Wyrley Performing Arts High School

They are an 11-18 Community High School and as such they are striving to be the hub of the local community.

Greenfield School Community and Arts College

Their driving aim is to fully equip students for progression into further training, education and employment according to their individual strengths and ambitions.

Haslingden High School

The school's approach is emphasised in our main aim of "Achievement for All".

Hayes School

Hayes School has a strong academic tradition, a reputation for high expectations and standards and an excellent atmosphere marked by positive relationships.

Heathfield Community College

This is a specialist music high school in Old Heathfield

Helenswood School

The Aims of the School Helenswood exists to encourage and challenge girls of the Hastings area to develop into well-educated, confident young women ready to lead fulfilled lives in any sphere they choose and to contribute to the lives of others.

Hertswood School

Hertswood is a thriving community at the heart of Borehamwood life. They enjoy a reputation for academic achievement, a welcoming community and an innovative approach to twenty first century learning.

Icknield High School

Icknield High School is a state funded, secondary school catering for pupils aged between 11 and 16 in Luton.

Kings College for the Arts and Technology

Kings College prepares all of its students to play their part as highly skilled and adaptable individuals in a global community.

Kings International College for Business and the Arts

This is a specialist music high school in Surrey.

Latimer Community Arts College

Latimer Community Arts College has been described by OfSTED Inspectors as a "warm, safe, secure and happy college."

Longcroft School and Performing Arts College

Longcroft School and Performing Arts College (or just Longcroft for short) is a secondary school and 6th form college for boys and girls in Molescroft.

Magnus CofE School

This is a specialist music high school in Newark.

Medina High School

A co-educational, 13 to 19, comprehensive school situated on the outskirts of Newport.

North Leamington Community School and Arts College

An 11-18 mixed comprehensive of approximately 1350 students, including 200 in the Sixth-Form.

Norwood School

An independent co-educational k-8 school.

Our Lady and St John Catholic Arts College

Our Lady & St John Catholic Arts College is a Catholic 11-16 Voluntary–Aided Comprehensive School whose task is to provide an environment wherein boys and girls will be able to develop spiritually, socially, intellectually and physically.

Plant Hill High School

This is a specialist music high school in Manchester.

Purcell School

An elite music school in Hertfordshire, catering for all instruments and offering many performance opportunities to students

Samuel Ward Upper Arts and Technology College

This is a specialist music high school in Haverhill.

Somerset College of Arts and Technology

Somerset College is a vibrant, exciting College based in Taunton, Somerset.

Sudbury Upper School & Arts College

Sudbury Upper School and Arts College is a 13-18 comprehensive school.

The Avon Valley School and Performing Arts College

This is a specialist music high school in Newbold-on-Avon.

The County High School Leftwich

This is a specialist music high school in Northwich.

The Earls High School

This is a specialist music high school in Halesowen.

The Ferrers Specialist Arts College

The Ferrers Specialist Arts College is a comprehensive secondary (11-19) school serving the East Northamptonshire towns of Higham Ferrers and Rushden and the surrounding area.

Wells Cathedral School

An elite music school, catering for all instruments with a strong woodwind department and regular performances and festivals.

Woldgate College

Woldgate College is a school and sixth form college in Pocklington, East Riding of Yorkshire, England.

Wolsingham School and Community College

Wolsingham School and Community College, situated in picturesque Weardale. Their aim is to pursue the highest standards of academic excellence built on the cornerstone of care and security.

Yateley School

Yateley School is a secondary school situated in Yateley, Hampshire, UK. It educates for children aged 11 – 16.

7 School-related Music Associations

Associated Board of the Royal School of Music

The ABRSM is a non profit organisation dedicated to teaching music to people all around the world.

Berkshire Young Musicians Trust (BYMT)

Comprehensive and structured approach to instrumental and vocal musical training for young people.

Music for Schools Foundation

Teaching charity providing music lessons on brass and woodwind instruments to primary school children around the U.K.

Musical Bumps

Musical Bumps classes are carefully tailored to the child's age group. Each session will address the child's needs and help to make music with the child that is both fun and appropriate.

National Children's Wind Orchestra

<http://www.ncwo.org.uk/ncwo.php>

The Schools Music Association

The Schools Music Association is recognised as a national voice for music in education.

Voices Foundation

Music education charity providing innovative singing-based training and support programmes for teachers, children and parents throughout the U.K. and overseas.

8 *Specialist Music Colleges*

Addington School

Addington School is a special school of 200 students with ASD, MLD, PLMD.

Amery Hill School

Amery Hill School is a secondary comprehensive in Alton, Hampshire for 11-16 year olds

Coloma Convent Girls' School

Voluntary aided school for girls aged 11-18.

Guildford County School

A co-educational comprehensive school providing courses for pupils of all abilities aged 11 to 18.

Haling Manor High School

Haling Manor is committed to providing all students with a fulfilling and challenging environment that supports academic achievement and prepares them for adult life as confident members of the community.

Highworth Grammar School for Girls

Selective school for ages 11 to 18.

Hinchley Wood School & Sixth Form Centre

This is a specialist music school in Surrey

Humphry Davy School

Humphry Davy is a forward looking school that has recently attained Music (& Mathematics) Specialised School Status

Jo Richardson Community School

The school places great emphasis on the pastoral care and social education of the students.

Northampton School For Girls

The only girls' comprehensive school in Northampton.

Oaks Park High School

This is a specialist music school in Essex.

Queen Elizabeth's Mercian School

QEMS is an 11-18 comprehensive school situated to the north of Tamworth.

Queen Elizabeth's School, Barnet

This school is a non-denominational, non-fee-paying, selective School with a mission of producing confident, able and responsible young men.

Simon Langton Girls' Grammar School

Simon Langton Girls' Grammar School is a Voluntary Controlled Secondary Grammar School for Girls taking day pupils only and currently containing 1060 girls.

St Andrew's CofE Voluntary Aided High School

This is a specialist music school in Surrey.

The Camden School for Girls

Camden School for Girls is a comprehensive girls' secondary school with a mixed Sixth Form.

The Coventry Blue Coat Church of England School

The Coventry Blue Coat Church of England School and Music College is a comprehensive school in Coventry, England

The Judd School

A voluntary aided grammar school for boys, with a number of girls in the sixth form, situated in Tonbridge, Kent

The Roseland Community School

This is a specialist music school in Cornwall

Twyford Church of England High School

Twyford Church of England High School is located in Acton in the London Borough of Ealing in West London. It is a very popular and successful 11-18 mixed comprehensive school with over 1200 pupils.

9 Elite Music Colleges

Royal College of Music**Trinity College of Music****Royal Academy of Music****Birmingham Conservatoire****Royal Northern Collage of Music****Guildhall School of Music and Drama**

10 University Music Departments

Anglia Ruskin University - Department of Music and Performing Arts

The Department offers courses at undergraduate level in Music, Drama and Creative Music Technology and at postgraduate level in Music Therapy.

Canterbury Christ Church University - Music Department

The Department of Music is acknowledged widely to be one of the most active and exciting centres for the composition, production, performance and study of music in the South East.

City University London - Department of Music

They offer modules in an unparalleled range of subject areas including performance, western music, non-western music, music technology, and composition.

Royal Holloway, University of London - Department of Music

Holloway is internationally renowned for its research and teaching and the world-class excellence of its staff and students.

School of Oriental & African Studies, University of London - Department of Music

The Department of Music is highly rated for teaching and research in African & Oriental music.

University of Aberdeen - University Music

The department has 8 members of staff with a wide range of research interests spanning performance, composition and musicology; in addition to this they have over 25 visiting instrumental teachers who bring their practical expertise and experience to their programme.

University of Birmingham - Department of Music

The Department helps to organise the Birmingham Early Music Festival (BEMF). The University has two symphony orchestras, choirs and many other ensembles.

University of Bristol - Department of Music

Academic staff and research students in the Music Department either write music (see Composition) or write and speak about it, in which case their discipline is musicology.

University of Cambridge - Faculty of Music

The Faculty, one of the most famous university music departments in the world, remains at the forefront of research and education.

University of Chichester - Music Department

Their music programme focuses on music as an applied art, one that is engaged with the musical world in all its diversity and excitement; from improvisation, composition, and professional performance, to music therapy, and community music, as well as the traditional music analysis and critical theory.

University of Durham - Department of Music

The University of New Hampshire Department of Music is an accredited institutional member of the National Association of Schools of Music.

University of Glasgow - Department of Music

The Department undertakes quality research and teaching across a broad range of areas, with particular specialisms in Historical and Cultural Musicology, Scottish Music and Musicians, Music Technology, and Composition.

University of Nottingham - Department of Music

The Department is one of the highest ranked in the country.

University of Oxford - Faculty of Music

In the Faculty of Music, there are usually about 60 graduate students (about 15–25 from overseas) and 170 undergraduates reading for degrees in music.

University of Sheffield - Department of Music

The Music Department at the University of Sheffield is one of the largest in the UK.

University of Wales, Bangor - School of Music

They have a long tradition of academic excellence and received the top Grade 5 rating in the latest Research Assessment Exercise confirming their status as one of the UK's leading research universities.

University of Wolverhampton - Music Department

The aim of the Music Department is to enable people to become a versatile and practical musician, able to write about and discuss aspects of music and be confident in using relevant ideas, theories and methodologies.

University of York - Department of Music

This is the university music department of the University of York.

11 Amateur Bagpipe Bands

Boghall and Bathgate Caledonia Pipe Band

Boghall & Bathgate is an organisation focussed towards the competitive side of the pipe band movement and is currently under the musical direction of Pipe Major Ross Walker and Leading Drummer Gordon Brown.

Edinburgh Post Office Pipe Band and Dancers

The band promotes the traditions of piping, drumming and Highland dancing.

Milngavie Pipe Band

This band comes from Milngavie is situated to the North of Glasgow, in central Scotland.

Nottinghamshire Police Pipe Band

Based in Nottingham in the East Midlands of England. Whilst bearing the name and informal support of the Nottinghamshire Police, and the support of the Chief Constable in particular, the Pipe Band is actually composed mainly of civilians and is largely independent of the Police Authority as such.

Portlethorn & District Pipeband

The Portlethen and District Pipe Band were formed in 1993 by a small group of local enthusiasts with a general interest in Pipe Band culture.

Pride of Murray Pipe Band

The Pride of Murray are one of the very few Bands that perform at engagements in Full No1 Ceremonial Highland Dress.

RAF Halton Pipes and Drums

The RAF Halton Voluntary Pipes and Drums is one of 4 RAF Voluntary Pipes and Drums Bands co-ordinated by the RAF Pipes and Drums Association.

Rose and Thistle Pipes and Drums

Pipes and Drums Band based in Gosport/Portsmouth and available for functions including weddings, concerts, dinners and parties.

Stirling & District Schools Pipe Band

The Band Committee is made up of a dedicated group of parents.

Surrey Pipe Band

The Surrey Pipe Band evolved from the previous 'Surrey Highland Bagpipe Club', a group of pipers led by Roger Huth (previously a pipe major with the Scots Guards

Vale of Atholl Pipe Band

The band's programme continues, supplementing band funds through concerts both home and abroad and playing regularly at top venues including Gleneagles Hotel, Glamis Castle and Hopetoun House.

Appendix 2: Consumer Questionnaire

Individual Name / Initials: _____

Gender: Male Female

In which area of the UK do you live? (Please place X after one)

North of Scotland South of Scotland N. Ireland North East

North West East Midlands West Midlands East of England

Wales London South East, (not London) South West

Outside of UK

How old are you? (Please place X after one)

Under 25 25-35 35-45 45-55 55-65 Over 65

What instrument do you play?

| Types of Wood Instrument Played | (Tick as many as apply) | (List Type of Timber/Woods Used if Known) |
|---------------------------------|-------------------------|---|
| Bassoon | | |
| Oboe | | |
| Clarinet | | |
| Highland Pipes | | |
| Cor Anglais | | |
| Chanter | | |
| Scottish smallpipes | | |
| Flute | | |
| Ulillean pipes | | |
| Recorder | | |
| Penny Whistle | | |
| Guitar | | |
| Lute | | |

What is the main instrument you play?

Typical costs of instruments

| How much do you usually spend on buying an instrument? | State Expenditure (£) |
|--|-----------------------|
| Bassoon | |
| Oboe | |
| Clarinet | |
| Highland Pipes | |
| Cor Anglais | |
| Chanter | |
| Scottish smallpipes | |
| Flute | |
| Ulillean pipes | |
| Recorder | |
| Penny Whistle | |
| Guitar | |
| Lute | |

How often do you buy?

| How often do you expect to replace/buy a new musical instrument? | (Tick one of the below) | Name of instrument |
|--|-------------------------|--------------------|
| Once a month | | |
| Once a year | | |
| Once every 1 - 5 years | | |
| Once every 6 -10 years | | |
| Once every 11 -15 years | | |
| Once every 16 - 20 years | | |
| Once every 21 - 30 years | | |
| Once every 31 - 40 years | | |
| Less than once every 40 years | | |

Are you a member of an association of any kind?

| Do you play in or are a member of: | (Tick as many as apply) | Name of Association |
|------------------------------------|-------------------------|---------------------|
| An orchestra | | |
| A music school | | |
| A music association | | |
| A military band | | |
| Solo / Chamber | | |

What is the main instrument you play made of?

| What is your instrument made of (the main instrument you play) | (Tick one of the below) | Type of instrument |
|--|-------------------------|--------------------|
| Plastic | | |
| Wood/plastic composite | | |
| Wood only | | |

Quality issues

| What is the difference in quality between plastic, composite and wood instruments? | Comment on quality |
|--|--------------------|
| Plastic | |
| Wood/plastic composite | |
| Wood only | |

Do you think that instruments made of African blackwood are better quality than other woods?

Please explain why/why not.

Do you think that African blackwood / Mpingo is a threatened species? Yes No

Would you be interested in buying an instrument made from FSC certified African blackwood? (FSC means Forest Stewardship Council. Certification means guaranteeing the supply chain in an ecologically sustainable manner, which would provide a premium to community forest managers) **Yes No**

Why or why not are issues such as ethical trading, fair trade and certification important? Please explain

Motivating factors when being FSC certified

| | |
|--|-------------------------|
| Which of the following would be a motivating factor in you buying an instrument made of FSC certified timber: | (Tick as many as apply) |
| Conservation concerns | |
| Fair Trade concerns | |
| Peer pressure | |
| Clear product labeling | |
| Information from retailers | |
| Other | |

Price Premium?

| | |
|---|------------|
| How much of a price premium would you be willing to pay for an FSC certified instrument if you knew that the premium benefited producer communities? | (Tick one) |
| Less than 10% | |
| 10-25% | |
| 26-50% | |
| 50% | |

Have you noticed a trend towards greater demand for 'fair trade' instruments? Why? Why not?

Any other comments?

Many thanks for your time.

Would you like us to use your name or would you prefer this information to remain confidential?

Yes, use my name Don't use my name: keep confidential

Would you be interested in being contacted about a future sustainable blackwood campaign?

Yes No

Email (optional) : _____