A Comprehensive Study of the Music Sector in Ghana

Final Report

Contents

List of Abbreviations

CNC	Centre For National Culture
CSMTDP	Creative Sector Medium-Term Development Plan
GAPI	Ghana Association of Phonographic Industry
GHAMRO	Ghana Music Rights Organization
GCF	Ghana Culture Forum
GSGDA	Ghana Shared Growth and Development Agenda
GSS	Ghana Statistical Service
GoG	Government of Ghana
IMD	Institute for Music and Development
MCTA	Ministry of Chieftaincy & Traditional Affairs
MoC	Ministry of Communication
MoTI	Ministry of Trade & Industry
MoF	Ministry of Finance
MJAGD	Ministry of Justice & Attorney General
MoE	Ministry of Education
MTCCA	Ministry of Tourism, Culture and Creative Arts
MNO	Mobile Network Operator
MUSIGA	Musicians Union of Ghana
NAFTI	National Film and Television Institute
NDPC	National Development Planning Commission
UNCTD	United Nations Conference on Trade and Development
VAT	Value Added Tax

List of Tables

List of Figures

1 Executive Summary

1.1 Introduction

The Musicians Union of Ghana (MUSIGA), the umbrella body of music professionals, intends to collate economic information on the music sector to enable it prepare a medium-term strategic plan. This plan is in line with the Government of Ghana's medium term plan known as the Ghana Shared Growth and Development Agenda (2010 – 2013). KPMG was commissioned in 2012 by the Union to undertake a comprehensive study into the sector. This report has therefore been prepared with the aim of providing baseline data and assessing the contribution of the music sector to economy of Ghana. The following presents the summary of the findings of the study.

1.2 Country Profile

Political Environment

Since ushering into a democracy in 1992, Ghana has gradually moved to consolidate the gains it has made in the last two decades. The country has organised five successful and successive presidential and parliamentary elections. Ghana continues to enjoy stable and sound political atmosphere after the 2012 general elections that resulted in a court battle. The country had to wait for eight months for the Supreme Court of Ghana to validate the results. This was however seen by many observers as a way of testing the institutions established under the 1992 Constitution. Outlook for the country remains positive with future elections expected to peaceful. The country is projected to mature politically and to lead the way in the democratic dispensation within the West African Sub-Region.

Economic Environment

Ghana's economy was given a major boost in December 2010 when it commenced oil production, a new source of revenue to the central government. This was reflected in the real GDP growth of close to 15%. Inflation a key economic indicator has been declining since 2008 registering a single digit of an average of 8.7% in 2011. The rate has remained single until September 2013 when increases in fuel prices and other factors caused the rate to register double figure of 11.9%. Interest rates have remained high with the government borrowing rate pegged at 16%. The lack of capital inflows has put severe pressure on the domestic currency resulting in significant depreciation. The country current account position remains a challenge coupled with rising debt and inflation which partly resulted in a downgrade of its credit rating by Fitch in 2013 from B+ to B. Outlook remains cautiously positive with the government's budget deficit expected to significantly affect the economic stability.

Social Dynamics

According to the 2010 Population and Housing Census, the country's population stood at 24.7 million with about 57% estimated to be between 15 and 65 years. Also about 38% are below the age of 15 which shows that the country has a large youthful population whose main interest will be music related. The country's cultural heritage and numerous festivals make it a socially dynamic and varied society. The country is noted for its diverse cultural practices which all underpin the economic potential to be unearthed.

Technological Development

Ghana has made significant strides in technological advancement in the last two decades. There are six mobile communications operators in the country which provides the platform for musicians to sell their songs in the form of caller tunes. Three fibre optic cables have landed in the country and it is expected to propel the growth needed in internet communications and facilitate music downloads.

1.3 The Creative Industries in Ghana

The UNCTAD's definition of the creative industries encompasses – heritage (cultural and traditional culture), arts (visual and performing), media (publishing, and audio visual) and functional creation (design, creative services and new media). The creative industries in Ghana exhibit all the characteristics with all the nine domains being active. The most dominant domains are the performing arts, visual art, publishing and audio visual. These are the most vibrant sub-sectors which economically make significant contributions. The other domains such as the new media and creative services are at their developmental stages and expected to grow. Some domains have well organised structures and associations that bring members together to form a common strategic goal to pursue. However, even though the sector contributes to the economic growth of the country it is yet to be recognized in the estimation of national income of the country.

1.4 Music Sector Overview

Historical Perspective

Ghana's music sector has traversed a number of phases over the last century, which has resulted in the development of various genres. Ghana is known traditionally for its music and culture which also partly defines our values and origin. Traditional music (otherwise known as folkloric music) is embedded in our daily activities. Each community since time immemorial has evolved with a unique style of song for occasions such as festivals, funerals and naming ceremonies. Aside the traditional folkloric music, several other genres have emerged. Highlife music developed somewhere in the 1920s along the West African coast. This music involved a blend between traditional and brass music giving it a new flavour. The military interventions in the 70s and early 80s saw the exodus of many Ghanaian artistes to America and Europe. These young artistes combined the foreign music with traditional highlife, which saw Ghana producing some famous artistes.

In the 80s, there was a sharp decline in the music sector as most artistes had either left the country or had stopped playing and night clubs and concerts had began dwindling in numbers. The church then became a haven for developing talents in the sector. Gospel music genre begun to flourish as the church produced some notable artistes. The early 90s also saw the development of some more contemporary genres such as hip-life which was a blend between hip-hop and highlife. The return of some Ghanaian musicians from to Ghana from abroad resulted in the fusion of modern technology with our traditional music to create various shades of highlife and hiplife.

Industry Oversight

The music sector, until recently, had to work through a number of ministries such as the Ministry of Information and the Ministry of Chieftaincy and Culture for policy planning and programme implementation. The Ministry of Tourism, Culture and Creative Arts was created in 2012 as the government arm responsible for the creative arts including the music sector. Other ministries such as the Ministry of Justice and Attorney General and the Ministry of Trade and Industry all have responsibility in respect of the administration of intellectual property right.

Professional Organisations

The sector is inundated with a number of groupings with a recognized union known as the Musicians Union of Ghana. There are also six associations for the creators category and three for producers category. However, there appears to be a number of associations of musicians which have not been recognized. Though the formation of an association may not necessarily be a negative phenomenon, it may not encourage unity and a common sense of purpose for the sector.

Current Challenges

The sector has been known to be plagued with challenges such as piracy, disunity, lack of finance, limited infrastructure, and lack of recognition at the policy level. These and many other issues pose serious threats to the growth of sector.

Porter's Five Forces

The application of the Porter's shows revealed the competitive nature of the sector. The threat from substitutes remains very high as well the competitive rivalry among musicians. A number of foreign music has flooded the market and provide buyers options to choose from. Bargaining power of buyers and suppliers remain high.

1.5 Market Characteristics

Overview of Music Value Chain

Musical content typically flows through the value chain beginning with the stage of music creation and ending with that of music consumption. In between these two stages there exist the following stages:

financing, production, recording, editing, publishing, marketing, distribution and promotion. The degree and scale of each of the intermediary stages vary from country to country. Publishing (specifically the mechanisms of royalties' collection), marketing, distribution and promotion are among the stages whose potential have not been fully exploited by the Ghanaian music industry.

Volume of production by Type

Our analyses of the volume of music production considered the following areas of interest – musical genre, musical product (CD and cassette), number of albums produced within a year and the number of tracks per album (CD and cassette).

We observed that, gospel music genre is the highest produced musical genre followed by hip-life which is also followed by high life forming about 80%, 58% and 48% respectively. All music producers produce CDs however about 36% produce cassettes. The highest percentages of producers (36%) produce more than 5 albums within the year. This is followed by about 22% who produce 3 albums within the year. The highest percentages of producers (36%) produce 10 tracks per CD album and the highest numbers of producers (14%) produce 8 tracks per cassette album.

1.6 Regional and Local Sector Dynamics

Ghana has many varied styles of traditional music due to its vibrant ethnic groupings and geographic location in West Africa. The sound and movements vary from ethnic group and region. The southern sector of Ghana which comprises mostly the Akan states, the Ga-Adangbe, the Ewe and the Nzema make use of principally, percussion instruments such as atumpan, talking drums, atsimemevu, bomaa while the northern sector uses aerophones, chordophones and idiophones such as the goje, xylophones, and castanets.

Generally, Ghanaian music incorporates several distinct types of musical instruments, many of which are in an ensemble setting. Almost all the music types have its corresponding dances which are organized at community events and activity for all occasions. Among the popular dances are Kpanlogo, Kpatsa, Gome and Fume in the Greater Accra Region, while the Ashanti Region is noted for the Adowa, Kete and Nnwomkro. The Volta Region has a number of dances which include the Borborbor, Gota and Abgadza, whilst the Eastern Region has the Apiredwa and Klama. The Northern Region has the Bamaaya dance and the Central and Western regions are also known for the Asafo, Kundum and Abisa dances.

1.7 Regulatory Framework

Review of Regulations

Key legislations regulating the sector are the Copyright Act 2005 (Act 690 as amended in 2009), Copyright Regulations 2010 (LI 1962) and the Electronic Communications Act 2008 (Act 775). The Copyright Act and Regulations provide the framework for music works to be protected, economic right to authors and also the means for fighting piracy. The weakness identified was the lack of a clear definition of the scope of users of music to allow the collective management organisation to mobilise revenue. Additionally, the anti-piracy team has not been effective in executing its mandate due to logistical issues.

Review of Policies & Plans

The main policy documents and plans relating to the music sector are the Ghana Shared Growth and Development Agenda (2010 – 2013), Cultural Policy, Creative Sector Medium Term Strategic Development Plan (CSMTSDP) and the National Intellectual Property Policy and Strategy (NIPPS). The GSGDA (2010 – 2013), the major development plan for the country, makes provision for the creation of a Council for the creative sector. The Cultural Policy aims at promoting culture including music while the CSMTSDP is focused on action plans geared towards the development of sector within the medium term. NIPPS has been developed to harmonize intellectual property management and to ensure that it meet modern technological developments.

1.8 Economic Value Analysis

Size of the Industry

The size of the industry sought to measure the level of employment along the value chain of music production. This included music creation, production, promotion, marketing and distribution. Table 1.8.1 presents a summary of the total employment.

Table 1.8.1 Size of the industry

Category	Profession	Employment		
		Fulltime	Part-time	Total
Creators	• Performers/composers	2,240	1,760	**4,000**
	• Traditional Folkloric	N/A	N/A	**6,060**
	• State Security Services (Ghana Armed Forces, Police, Immigration, CEPS and Fire Service)	1,453	N/A	**1,453**
	• Brass Band	N/A	N/A	**1,050**
	• Concert Party	N/A	N/A	**240**
Business	• Producers/publishers/record labels • Supporting staff (3 staff per producer)	172 516	44 132	**216** **648**
	• Studio operators/Managers • Supporting staff	N/A	N/A	**250** **1,250**
	• Artiste managers	16	10	**26**
	• Manufacturers (local instrument producers	1,170	80	**1,250**
	• Manufacturers (CD production) • Supporting staff	N/A	N/A	**11** **55**
Sale and marketing	• Spinners • Supporting staff (2 staff per spinner)	1,356 2,712	1,469 2,938	**2,825** **5,650**
	• Distributors & retailers (including mobile vans)	4,100	900	**5,000**
Total		**12,282**	**7,333**	**29,984**

Source: KPMG Analysis; N/A means data is not available for the categorisation of professionals into part-time and full-time.

Along the value chain of music production, we estimate that employment is approximately 30,000. Majority of them are employed as fulltime.

Value of the Industry

In this section, an attempt was made to estimate the income generated per year by the industry. The estimation was done based on the sampling methodology adopted due to the absence of actual figures. Key revenue sources identified include CD and cassette sales, live shows, and sale of instruments. Table 1.8.2 presents a summary of the contribution of the sector to the GDP with 2012 as the base year.

Table 1.8.2 Contribution of the music sector to GDP

Areas of Value Addition)	Amount (GHC)
Sales of CDS & Cassettes	11,236,041
Live shows	74,598,240
Digital sale	7,254,000
Royalties	700,000
Merchandizing and Advertisement	1,032,756
Sponsorship	232,088
Instrument manufacturers	27,355,272
Spinners	17,415,768
Traditional performance	8,986,567
Public bands	834,251
Total	**149,644,983**
2012 GDP at current prices (Ghana cedis)	73,109,000,000
Percentage of music contribution	**0.20%**

Source: KPMG research and analysis

The sector adds approximately GH¢150 million to the GDP of Ghana, representing 0.20% of the 2012 GDP at current prices.

1.9 Social Contribution

Sociological aspects of music

The sociological salience of music can be framed in terms of three sets of questions (Roy, 2010):

1. Ontology: in terms of social relations, *what is music?* Three ontological approaches to music have been identified; conceptualizing music as an object, as a process and as being embedded (Bohlman, 1999).
2. Meaning: how do people create meaning from or in relationship to music?
3. Function: what does music do in social relationships and what do people do with music?

Benefits of music

Music is beneficial at the individual level because it can induce multiple responses – physiological, movement, mood, emotional, cognitive and behavioural. In early childhood there seem to be benefits for the development of perceptual skills which affects language learning subsequently impacting on literacy which is also enhanced by opportunities to develop rhythmic co-ordination. Music also seems to improve spatial reasoning, one aspect of general intelligence which is related to some of the skills required in mathematics.

Group music making is also beneficial to the development of social skills and can contribute to health and well-being throughout the lifespan and can therefore contribute to community cohesion providing benefits to society as a whole (Hallam, 2010). The benefits of music therapeutically can involve listening to and/or actively making music. Music can be effective in conjunction with other interventions in promoting relaxation, alleviating anxiety and pain in medicine and dentistry, and promoting wellbeing.

Social groups and events

Popular within the social circles in Ghana are the Choral groups, Traditional/folkloric groups/bands and the Public bands.

Almost all churches in Ghana (especially orthodox churches) have at least one choral group that performs during worship/church service. They attend competitions/choral festivals or perform on commercial bases. Some corporate organisations have choral groups as a means of providing work life balance for their staff; such groups are mostly not commercial.

Traditional/folkloric groups/bands exist all over the country. Due to their informal nature, there is a difficulty to identify an exact count of the number of groups that exist. It is as well difficult to keep track of their activities or to gather information about such groups. However, their activities mainly include social occasions like funerals, parties, festivals and durbars.

Aside the ceremonial activities of Public bands (state-owned bands), they perform during certain social activities like marriage ceremonies, funerals, festivals and some outdoor traditional durbars. Popular among the musical genres they play include contemporary highlife and afro beat/rock/jazz.

1.10 Industry Infrastructure

Training Institutions

The music sector has a few institutions, especially at the tertiary level that train professionals. There are about four public and two private universities that provide certificate and degree courses in music. There are also a few private music training schools but they are limited in funding and infrastructure. Since music was relegated to the background in the primary and secondary schools, students who pursue music at the tertiary level have limited basic knowledge in music. This lack of emphasis does not make music a profession for school leavers to pursue.

Aside the educational institutions, there are other institutions committed to building the capacity of music professionals. These include foreign cultural attaches such as the Goethe-Institute, Alliance Franciase, and the British Council which provide periodic seminars and workshops to the professionals. The Institute of Music and Development (IMD) also provides the platform for musicians to be nurtured and collaborates with other bodies to provide training.

Manufacturing

The manufacturing sector is made up of indigenous instrument manufacturers and audio-visual companies. Local instrument manufacturers dominate the music instrument manufacturing with no Western instrument manufacturing company in the country. These local carvers use mainly wood as the source of raw material for the production of drums. The decline in the sale of audio CDs appears to have affected the operations of these companies who have also diversified into the production of VCDs and DVDs for other sectors.

Digital Music Downloads

Digital music is downloaded over the internet or via the platform of a Mobile Network Operator (MNO). There are six MNOs in Ghana namely MTN, Vodafone, Tigo, Airtel, Glo and Expresso. Musical downloads over the platforms of MNOs have been sublet to and are being managed by Content Providers. They are licensed by the National Communications Authority and have formed an association called the Wireless Application Services Providers' Association of Ghana (WASPAG). Their caller 'Ring Back Tune' with the acronym RBT which provides the opportunity for songs to be utilised as caller tunes on mobile networks serves as a source of income for musicians.

Event organisers and Venues

Some events organised indoors in Ghana include the Ghana Music Awards, the Ghana Rocks Concert, Ghana Music Week Festival, Adom Praize and the 4syte Music Video Awards. Outdoor events include the Joy FM annual family fun park, Joy FM annual schools' reunion and the James Town's popular 'Chale Watte' street carnival.

Venues for music shows are varied including hotels, beaches and night clubs. However, there is limited capacity for national and international music events. The National Theatre and the Accra International Conference Centre are the two main venues with seating capacity of 1,500 and 1,800 respectively. These are woefully inadequate to accommodate audience at a reasonable ticket rate. As a result the Accra Sports Stadium has been used as the last resort for large audience international events.

1.11 International Dynamics

Ghanaian music abroad

Ghanaian music has received patronage from foreigners as well as Ghanaians living in the Diasporas. We observed that, about 80% of musicians perform live music. Out of those who perform live music abroad, we observed that the average number of performances is about 6 per year. Not many are nominated for or win international awards. Out of the number of musicians interviewed, 1.3% indicated that they had won one international award.

Music in Ghana is distributed primarily by Distributors. The operations of music Distributors were found to be based primarily in Ghana (98% of distributors) with a few based in other African countries and in America, these forms 2.9% and 2% respectively of the total number of Distributors.

Exposure of tourists to Ghanaian music

Most of the tourists that visit Ghana fall within the 20 – 26 age bracket and are mostly Nigerian, followed by those from other African countries or those from European countries. Popular genres that are easily patronized by foreign consumers include hip-life, reggae, gospel, highlife and afro beat music.

Volume of Exports

Sale of traditionally made musical instruments such as drums, xylophones, rattles, gongs, etc to countries such as United States, Germany, Netherlands and the United Kingdom forms part of the exportation of Ghanaian music. Ghana competes with other ECOWAS countries such as Cote d'Ivoire, Mali, Senegal and Guinea. From 1999-2003 for example, Ghana's export of percussion musical instruments to the world was US$ 985,000 (Council, 2006).

1.12 Linkage with other Sectors

Music as a subject - Musicology

The disciplinary neighbours of musicology address other forms of art, ritual and communication. Musicology as a discipline has many parent disciplines including culture and gender studies, physiology and neuroscience, acoustics and psychoacoustics, computer sciences and mathematics among many others. Two central, practically oriented sub-disciplines with no parent disciplines are performance practice and research; and the theory, analysis and composition of music.

Music as an art – Applied Musicology

Within the arts, music may be classified as a performing art, a fine art and auditory art. It may also be divided among art music and folk music. Musical knowledge and know-how are applied in various fields including fashion, film, theatre art, medicine and therapy.

1.13 SWOT Analysis

Strengths

The sector has thrived on the pool of talents that are available along the value chain, which continues to be a key driving factor. Additional strengths include the legislations that make provision for the copyright protection of musical works. The Ghanaian music market is also developing including a thriving electronic media which depends on music as content.

Weaknesses

Internally, the sector has faced severe weaknesses including piracy, lack of unity, lack of strategic initiatives, low funding and low profitability. Other weaknesses identified during the study include the lack of skilled professionals, limited educational institutions and lack of recognition within policy planning.

Opportunities

The opportunities identified for the sector include the creation of a Ministry for the creative arts, the proposed Centre for Creative Industries, and the development of the National Intellectual Property Policy and Strategy.

Threats

Music from other jurisdictions, technological advancement (which are likely to promote piracy) and the likelihood for professionals to leave the country pose the most threats.

1.14 Recommendations

Table 1.14 below presents recommendations for the thematic areas identified.

Table 1.14 Recommendations

Theme	Recommendations
Sector Recognition	• A new ministry should be created for the creative art sector • Incorporate the economic contribution of the music sector in particular and the creative art in general in the national statistics
Sector Organisation	• A Council should be created for the creative arts • MUSIGA should develop a medium to long term development plan for the sector
Education and Capacity Building	• The Ministry of Education should reconsider elevating music as a discipline in the basic and secondary schools • Government should support the music training school established by MUSIGA • The Ministry of Education should collaborate with private music education institutions to leverage on their expertise • MUSIGA should undertake training needs assessment of members and collaborate with the capacity building organisations
Infrastructure	• The government should assists in building venues in the regional capitals to host music shows. This could be done by redeveloping centres at the regional centres for national culture • Create the enabling environment for the private sector make investment into the music sector
Regulatory	• Empower the anti-piracy monitoring team to enhance effectiveness • The users of music should be properly defined to give the legal mandate to GHAMRO for the collection of royalties • The National Communication Authority (NCA) should ensure that radio stations have logging systems to log music played.
Collective Management Organisation	• The Ghana Music Rights Organisation should be restructured and a functional management team put in place • GHAMRO should review the criteria for the distribution of royalties to members
Marketing & Packaging	• Improve on the packaging of CDs to make them attractive • The Ministry of Foreign Affairs should set up a culture to market Ghanaian music • The Ministry of Foreign Affairs and the Ministry of Tourism and Culture should collaborate with musicians to promote music at international festivals

Theme	Recommendations
Financing	• A fund should be created for the creative arts where each of the domains could apply. • Train music professionals on business proposal writing to enable them access funds
Taxation	• Value added tax on ticket sale should be removed to reduce the price of tickets for live shows • The government should consider providing tax incentives for companies which sponsor music related events
Performance Fees	• MUSIGA should develop a standardized fee structure for live shows

Source: KPMG research and analysis

1.15 Conclusion

The study sought to provide a baseline data for further studies to be conducted to assess the growth pattern. Even though the sector has traversed many phases, it holds the potential to grow to become a major contributing sector to the socio-economic development of Ghana. In this light, policy makers, industry players, researchers and all stakeholders need to collaborate to ensure that gains are sustained and challenges are contained.

2 Introduction

2.1 Project Background

The Musicians Union of Ghana (MUSIGA) intends to prepare a four–year medium term strategic plan to guide the development of the Ghanaian Music Industry. For this purpose the Union required a market study and analysis of the music industry in Ghana to assist in the preparation of the strategic plan. The market study and analysis is to assess the contribution of music to the Ghanaian economy and the challenges that need to be overcome to enter the global music market with Ghanaian music. This is in line with government policy strategy to promote research into the overall creative industry and access to data to inform evidenced based policy making as captured in the Ghana Shared Growth and Development Agenda (GSGDA) 2010 – 2013 document.

Such information will also be used to justify investments into the sector and attract more stakeholder attention to the industry and promote strategies for growth. The document will also form the framework for the formulation of government policy on the music industry as well as provide the basis for the formulation or amendment to existing legislation on the industry.

For this purpose, MUSIGA commissioned KPMG to undertake a comprehensive study of the sector and to make appropriate policy recommendations.

2.2 Objectives

The objective of this assignment is to conduct the following:

- Provide a baseline data on the music industry using both primary and secondary data
- Understand and explain the structure and functioning of Ghana's music industry with a view to identifying its areas of strength and weakness
- Make recommendations and proposals to stakeholders and government on the way forward with the industry
- Stimulate discussion both within the music industry and between the music industry, government and other interested organisations as to what projects and processes would be most useful in building the Ghanaian music industry.

2.3 Scope of Work

- Provide baseline data on the music industry in Ghana.
- Establish the nature of the music industry value chain from point of production to its sale on the market and identify all significant players within the sector.
- Benchmark a thriving music industry and establish market trends, marketing strategies, institutional and organizational dynamics, technological innovation and trends in music genres.
- Evaluate sales & distribution methods and channels in the industry highlighting strengths and weaknesses.
- Identify and segment the market according to genres with clear characteristics of each segment and establish volume of sales for each sector.
- Identify the challenges to the sector including but not limited to issues such as piracy, copywriting, influx of western music and access to long term financing.
- Estimate the contribution of the music sector to the gross domestic product (GDP).

- Review existing legislation within the sector and make policy recommendations to the government.
- Recommend new policy and legislation proposals to government that would get the Ghanaian music industry on the world map.

2.4 Justification

The music sector in Ghana has been through peaks and troughs over the past years. The sector has produced some sensational professionals who have received international recognition, in the likes of Reverend Allotey Pappoe, Ephraim Amu, Prof. J.H.K. Nketia, E.T. Mensah, King Bruce, Kwaa Mensah and E.K. Nyame[1]. The sector has thus seen growth albeit slow as it may seem over the past years. The lack of rapid growth may be due to a plethora of issues that require empirical data to ascertain its nature and extent.

One key challenge that the industry faces is the lack of investment into human capital and physical infrastructure. Over the years, the sector has received little financial support to train and equip professionals to perform to the standard required internationally. The lack of adequate training institutions and equipment has limited the ability to develop the individual talents required within the value chain.

Related to the development of human capital is the gradual *'extinction'* of music from the curricula of basic and secondary schools. Music, as it stands, is not a mandatory subject in schools and has been merged with other forms of creative art which reduces the prominence given to the sector. This phenomenon has caused industry players to raise concerns emphasizing its critical role in building well educated music professionals. The importance of music education for nation building by the Convention's Peoples Party (CPP) government was reflected by long term benefits to the music scene that lasted up until the early 1970s when Ghana was West Africa's leader in popular music and the commercial music industry. Some of the musicians who benefited from Nkrumah's CPP policies include Teddy Osei and Ebo Taylor among others who were sent on scholarships to study in the United Kingdom. Uhuru, the Messengers and the Brigade dance bands were sent to the Arts Council around 1963 to pursue a 3 month course on African music and dance. Other artists accompanied Nkrumah abroad like E. K. Nyame, Onyina, Bob Cole and others. On top of this, music was a core subject in the school curriculum and many of Ghana's top musicians got their training in school bands - until this policy was discontinued in the 1980s by the Provisional National Defence Council (PNDC) government.

The sector has and still is struggling to eliminate the piracy canker with little success and has become more pronounced with the advent of variant internet downloading and uploading technologies and devices. Again, creators of music have found it difficult to have access to marketing and distributing channels, sometimes incurring significant costs to enable their product to be advertised.

The most critical issue that confronts the sector is the needed recognition from the policy perspective within the broader creative industry framework. Past governments have paid little attention to the sector citing issues such as the lack of data for policy formulation and the lack of coordinated activity within the entire creative industry. This has led to the virtual exclusion of the industry from budgetary process stifling the industry of much needed financial support.

Government financial support to the music sector over the years has been minimal. In the year 2012, the Government of Ghana allocated funds to support the sector under the Ghana Shared Growth and Development Agenda (GSGDA). It is evident that the National Development Planning Commission (NDPC), the authority mandated to put together policy and plans for the government, requires reliable statistics to plan and make budgetary allocation to the sector.

[1] A list of some sensational Ghanaian professional musicians (organised into genres) is presented in Appendix C

2.5 Methodology

2.5.1 Sources of Data

The data for this study were gathered mainly through the following sources; review of relevant documentations, interviews and questionnaire administration.

The reviewed documents were obtained mainly through desk and internet research, academic publications from the Music department of the University of Ghana, industry experts and representatives of active organisations in the music industry.

Interviews were conducted with Cultural Attaches of foreign Embassies in Ghana, Government Agencies and Ministries, executives and representatives of active organisations within the music industry and other key stakeholders of the music industry.

To successfully administer questionnaires, the music industry was stratified into eighteen (18) different strata[2]. The name and composition of each stratum are as indicated in Table 2.5.1 below:

Table 2.5.1 Stratification of music industry

Name of Stratum	Composition of Stratum	Number of Individual Respondents
Artiste Managers	1. Formal establishment 2. Individual	12
Bands	1. Traditional/Folkloric Groups 2. Church/Gospel Bands	85
Choral Groups	This stratum was not further subdivided into other subcategories	29
Consumers	1. Resident Ghanaians 2. Non-resident Ghanaians on a business trip 3. Foreign nationals residing in Ghana 4. Foreign nationals on a business trip	230
Distributors	1. CD and/or Cassette Distributors 2. Music product retailers (Cassette and CD Sellers) 3. Digital Download Companies	102
Educational Institutions	1. Public institution 2. Private institution	14
Event Organisers	1. Event organiser (Formal establishment) 2. Promoter (Individual)	4
Executive Producers	1. Record labels 2. Publishers 3. Executive Producers	59
Manufacturers	1. CD Manufacturers 2. Cassette Manufacturers	4
Media and Telecom Companies	1. Radio Stations 2. Television Stations 3. Telecom Company	100

[2] A thorough categorization of the music industry and their sub-categories are presented in Appendix E

Name of Stratum	Composition of Stratum	Number of Individual Respondents
Music instrument manufacturers and repairers	1. Traditional/indigenous manufacturers and repairers	28
Musicians (including contemporary/popular)	1. Lyricists 2. Composers 3. Arrangers 4. Performers/Singers 5. Instrumentalists 6. Dancers/Choreographers and Club DJs	445
Public Bands	1. Army 2. Navy 3. Air Force	7
Spinners	1. Full time 2. Part-time	129
Sponsors	1. Corporate entity 2. Individual	2
Studio Managers/Operators	1. Sound Engineer 2. Music Video Creator/Producer 3. Film maker/producer (feature films and documentaries) 4. Studio Manager/Operator	4
Tourists	1. Non-resident Ghanaians on tour 2. Foreign nationals on tour	25
Venue Owners/Operators	1. Night clubs 2. Beach resorts 3. Drumming/Music/Dance Schools 4. Cultural Centres 5. Foreign embassies and their cultural locations 6. Parks, Gardens, Open-air, Trade fair sites, Amusement parks 7. Hotels/Restaurants 8. School and university venues and grounds 9. Street events/Carnivals	40

Source: KPMG research and analysis

Table 2.5.2 Stakeholder interviews

Name of Category	Composition of Category	Number Interviewed
Embassies and Cultural Attaches	1. Alliance Française 2. Goethe-Institute 3. British High Commission	3
Government Agencies	1. Ministry of Trade and Industry 2. Ministry of Tourism, Culture and Creative Art 3. Ministry of Chieftaincy and Traditional Affairs 4. Ministry of Justice and Attorney General – Copyright Office	4

Source: KPMG research and analysis

We designed questionnaires for each of these strata and tested the questionnaires through a pilot survey. The questionnaires were administered to a total of forty one (41) respondents during the pilot survey to test the questionnaires. This was efficiently done by emails and face to face administration where respondents were provided personal guidance in answering the questions. Questionnaires that were administered via emails gave results that showed a clear misunderstanding of the questions and as such we realized that it was better to administer the questionnaires using a face to face approach and to provide personal guidance in answering the questions.

The revised and finalised questionnaires were administered to a total of one thousand three hundred and nineteen (1,319) randomly sampled respondents from all eighteen (18) strata with an approximate margin of error of 2.8%. The questionnaire administration was carried out between June and July of 2013. Overall, the survey was conducted in all ten (10) regions of the country. Based on the knowledge we gathered from industry experts and due to the nature of some strata, questionnaires were not administered for some regions as respondents did not exist in such strata.

The data we obtained from all three (3) main sources has been processed using both qualitative and quantitative analysis. The qualitative analysis we adopted included the SWOT analysis and was based mainly on expert opinions and in-depth information from the key industry players concerning population estimates of the various categories of the industry, reviewed background information and data from the survey. The questionnaires were administered interactively with the intention of gathering more information from the respondents and used for quantitative analysis. Data received from the administered questionnaires were also used in the economic value analysis and other specific industry analysis.

2.5.2 Sampling Techniques

Due to the natural categorization of the various players of the music industry, we adopted a two stage stratified random sampling technique with simple random sampling without replacement at each of the two stages. The stratifying factor at the first stage was the professional categories of the stakeholders and the region within which they are based was used as the stratifying factor for the second stage. Allocation of sample size within each stratum was done using proportionate sampling (otherwise known as proportional allocation). We adopted mechanical randomisation (otherwise known as the random numbers method) as the method of selection of the random sample.

Simple random sampling was adopted for the categories for which there was no sampling frame.

2.6 Limitations

This report presents a study of the music sector as a component of the creative industry. The analysis and conclusions are therefore meant for the music sector exclusively and not to be generalized for the creative industry as a whole. Both secondary and primary data have been used for the study.

There is limited availability of documented data in the music industry. As such, some of the information received from the industry experts was not possible to be verified by any form of written documentation.

There is currently no existing information on the total population of all the various participants of the music industry and as such it is not possible to determine exact population sizes. Estimations and guided guesstimates in consultation with key industry players have been averaged and used to approximate the total population sizes for the strata that do not have a registered list of members.

As much as possible information obtained have been verified from the source and believed to be reliable and accurate at the time of collecting it. Market conditions are likely to change hence economic analysis and any projections thereof are subject to changes in the market place.

2.7 Conclusion

The main aim of the study is to assess the economic and social contribution of the music sector to the socio-economic development of the country. Among other things, it has the objective of providing baseline data, understanding the functioning of the market, making recommendations and stimulating discussions within the broader creative industry. To achieve this objective, the methodology has been designed to capture critical data and to ensure that salient segments of the value chain are analysed.

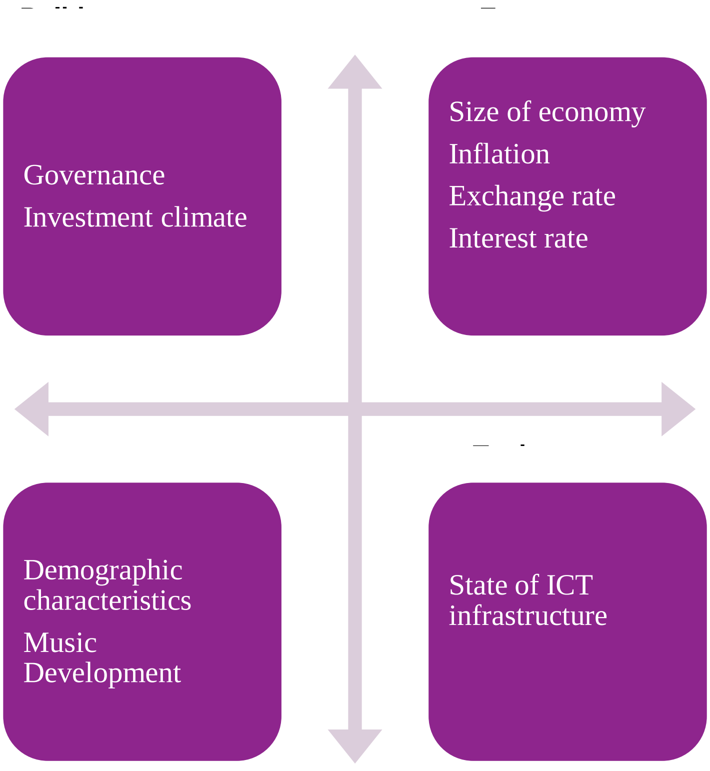
The methodology involves administration of questionnaire using sampling based on strata and simple random sampling and interviews with persons and organisations relevant to the industry.

3 Country Profile

3.1 Introduction

This section examines the impact of the political, economic, social and technological (PEST) factors on the music sector. The analysis is aimed at identifying the external and internal factors that impact on the effective and efficient functioning of the sector in Ghana. Figure 3.1.1 presents the identified factors.

Figure 3.1.1 PEST analysis



Source: KPMG research and analysis

3.2 Political Environment

- Governance

Ghana has once been described as the ‘oasis of Africa’ due to the stable political environment. Ghana is widely regarded as a rapidly maturing African democracy, with peaceful elections and power transitions since the multi-party system was introduced in 1992. The country has made appreciable progress in institutionalizing multiparty democratic governance within the framework of the 1992 Constitution. This followed a period of military interventions after gaining independence in 1957. Attempts have been made by previous regimes to initiate multiparty democracy but were interrupted by military rule. In 1992, the country adopted a new constitution, which adopted the presidential and parliamentary system of government.

The 1992 Constitution shares power amongst the executive, the legislature and the judiciary. Since then, there has been smooth transition of power from one democratically elected government to the other. The recent presidential and parliamentary elections saw the incumbent government of the National Democratic Congress (NDC) winning the presidential as well as majority in parliament. Though the opposition party, the New Patriotic Party (NPP) challenged the results in the Supreme Court, the Supreme Court of Ghana dismissed the petition in August 2013. The ruling validated the election of the President John Dramani Mahama. The petition appeared to threaten the peace being enjoyed by the country but the ruling ensured that the democratic credentials of the country are enhanced.

In comparison to the situation in the other West African countries, and even across the entire continent, the political environment in Ghana can be considered peaceful and significantly stable. The peaceful atmosphere currently in existence has led to the influx of a number of businesses into the banking, insurance, mining, telecommunications, trading as well as the real estate industry. This trend is expected to continue and will have positive impact on the growth of businesses in general including the music sector.

- Investment Climate

Ghana has created an enabling environment for businesses to thrive in various sectors including the creative industry. The ruling party led by His Excellency John Dramani Mahama, has created a Ministry for Culture, Creative Industry and Tourism. The Ministry is expected to develop policies and programmes geared towards the development and growth of the music sector in particular and the creative industry as a whole. The government in its 2012 and 2013 budget statements made an allocation of GH¢2.0 million and GH¢3.0 million respectively to the creative industry for research and also develop a medium term strategy for the sector.

Even though the music sector remains one of the sectors with huge growth potential, it has not enjoyed the investment benefits that other sectors enjoy. The sector is yet to receive incentives such as tax holidays to enable it to grow to the point where it can sustain the payment of taxes back to government.

3.3 Economic Environment

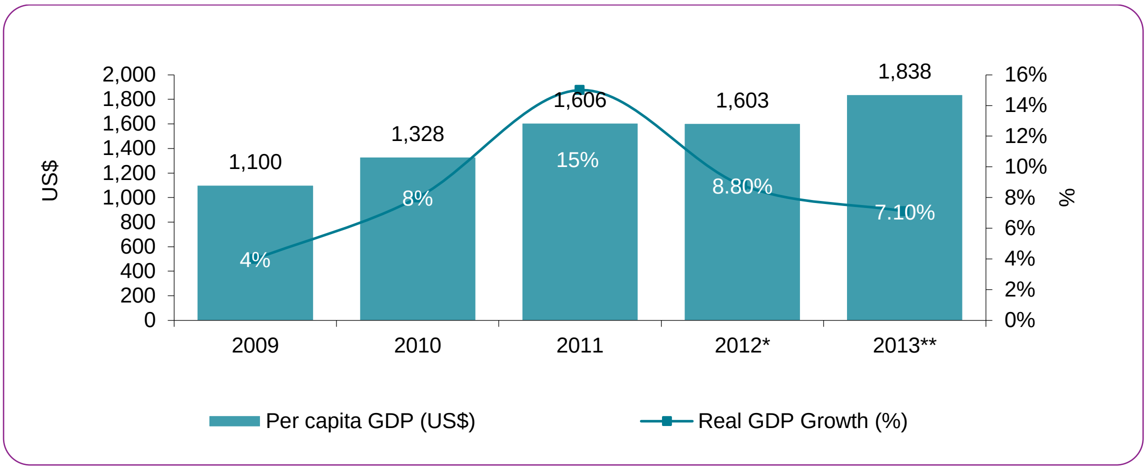
The three broad economic sectors which contribute to GDP are the agricultural, industrial and services sectors. The agricultural sector which for long had dominated economic activity has given way to the services sector after the rebasing of the national accounts series from 1993 base year to 2006 by the Ghana Statistical Service (GSS) in November 2010. The services sector remains the largest sector with a share of 49.5% of GDP, followed by the industrial sector 28.6% and the agricultural sector 22%.

The music sector is implicitly part of the services sector but is yet to be given the necessary attention for inclusion into the GDP calculation. This is one of the primary objectives of the study, which is to ascertain the parameters for GDP and to estimate the contribution.

- **Gross Domestic Product (GDP)**

Ghana has made tremendous strides in growing its economy over the past five years. Total value of GDP (in current prices) recorded in 2008 was GH¢30.179 billion, increasing consistently to a higher value and it is estimated to reach GH¢93.5 billion at current prices as at the end of 2013. Overall, Ghana has witnessed fluctuating trend in real GDP growth over the past five years. From 4% in 2009 it increased consistently peaking at 15% in 2011 mainly due to oil revenue inflow. It however reduced again to 8.8% in 2012 and moved further downwards to 7.1% in 2013. The chart presents GDP per capita and real GDP growth from 2009 to 2013. After a decline in 2009, the country’s GDP per capita grew year-on-year from US$1,100 in 2009 to US$1,838 in 2013 as shown below.

Figure 3.3.1 GDP per capita and real GDP growth rates



Source: GSS and KPMG Analysis

- **Average Inflation**

Ghana achieved single digit inflation in 2010 and maintained it through to 2012. This achievement was as a result of the Government's efforts in stabilising the economy. This notable performance was however short lived as inflation increased again to 11.5% by the end of 2013. Headline inflation, as at May 2014 towered to a high record of 14.8% since 2009, averaging 11.86% for the review period. This has significantly exceeded the year's target of 9%. The pass through effect of the fuel and utility price increases and demand pressures have been the cause of this rise.

- **Prime rate and commercial interest rates**

The Bank of Ghana's (BOG) prime rate stood at a rate of 18% in 2009 and was lowered to 12.5% in 2011. The rate was later revised upwards for three consecutive times in the year 2012. It was increased to 13.5%, 14.5% and 15% in February, April and June respectively and remained same as at April 2013. As at the end of 2013, the rate had inched up slightly to 16%. The rate shot up again to 18% in February 2014 and further to 19% in July 2014.

Lending rates are very responsive to the pattern of the prime rate as banks pass on increases to customers. Cost of borrowing is quite expensive. According to Business Ghana, the base lending rate as at 02nd October, 2014 ranges from 17.65% to 31.89%. Figure 3.3.1 depicts trends in interest rate and inflation rate.

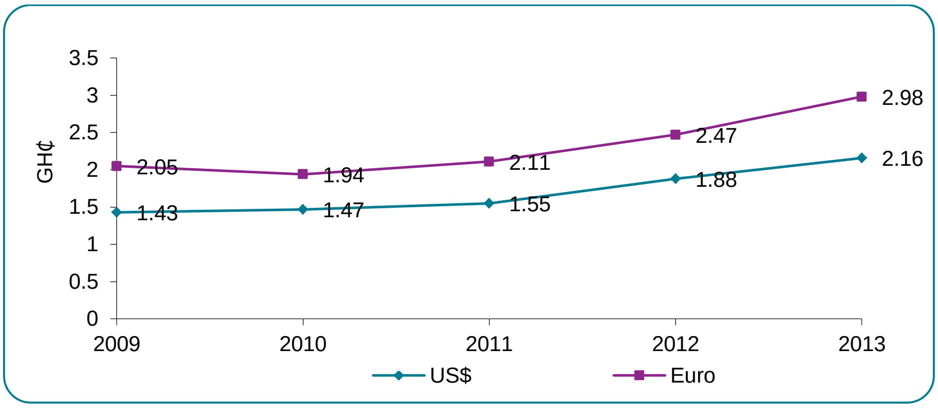
Table 3.3.1 Trends in interest rate and inflation

Source: GSS and KPMG Analysis

- **Exchange Rate**

For most parts of 2008 and early 2009, the cedi depreciated against the major foreign currencies. However, 2009 to 2010 saw the Ghana cedi appreciating against all major currencies. Since then the cedi has been depreciating again against the major foreign currencies. By the end of December 2013, the rate of the dollar in terms of cedis was GH¢2.16 and that of the euro was GH¢2.98 as shown in the chart below. As at 07th October, 2014, the rates stood at GH¢3.2 and GH¢5.1 for the dollar and Euro respectively.

Figure 3.3.2 Average exchange rate of the Dollar and Euro to Ghana Cedis



Source: GSS and KPMG Analysis

3.4 Social Dynamics

- **Demographic Characteristics**

Ghana conducted population and housing census in September 2010. Table 3.4.1 presents the results of population, percentage share and density levels by region.

Table 3.4.1 Population characteristics

	2012 (Estimate)		2010		2000	
Region	**Total**	**% Share**	**Total**	**% Share**	**Total**	**% Share**
Western	2,426,620	9.6	2,376,021	9.6	1,924,577	10.2
Central	2,274,183	9.0	2,201,863	8.9	1,593,823	8.4
Greater Accra	4,141,329	16.4	4,010,054	16.3	2,905,726	15.4
Volta	2,173,764	8.6	2,118,252	8.6	1,635,421	8.6
Eastern	2,692,550	10.6	2,633,154	10.7	2,106,696	11.1
Ashanti	4,916,120	19.4	4,780,380	19.4	3,612,950	19.1
Brong-Ahafo	2,367,440	9.3	2,310,983	9.4	1,815,408	9.6
Northern	2,557,211	10.1	2,479,461	10.1	1,820,806	9.6
Upper East	1,060,109	4.2	1,046,545	4.2	920,089	4.9
Upper West	716,077	2.8	702110	2.8	576,583	3.0
All Regions	25,325,403	100.0	24,658,823	100.0	18,912,079	100.00

Source: GSS, 2010 population and housing census & KPMG Analysis

Though Ashanti Region has the largest population share for both census periods, in terms of percentage increase, Greater Accra registered the highest growth in 2010 over the previous year. Greater Accra has been experiencing both internal and external migration, accounting for the rapid increase over the ten year period.

The population density measures number of persons living within an area (an example is the number of persons per square kilometre). Greater Accra is the least in terms of area but is the second most populous region hence has the highest density. Density levels have been growing over the last three census periods as shown in the following Table 3.4.2.

Table 3.4.2 Population density

	Area	2010	2000	1984
Western	23,921	99	80	48
Central	9,826	224	162	116
Greater Accra	3,245	1,236	895	441
Volta	20,570	103	80	59
Eastern	19,323	136	109	87
Ashanti	24,389	196	148	86
Brong Ahafo	39,557	58	46	31
Northern	70,384	35	26	17
Upper East	8,842	118	104	87
Upper West	18,476	38	31	24
All Regions	**238,533**	**103**	**79**	**52**

Source: GSS, 2010 population and housing census & KPMG Analysis

- **Age Distribution**

Table 3.4.3 Age distribution

Age Groups	Population	% of Total Population
0-14	9,450,398	38%
15-64	14,040,893	57%
65+	1,167,532	5%
Total Population	**24,658,823**	**100%**

Source: GSS, 2010 population and housing census & KPMG Analysis

A greater percentage of the population falls within the 15 to 64 years bracket as shown in the table above. The implication of this trend is that Ghana's population is endowed with a vibrant youth who are potential targets for music related professions[3].

- **Society and Music Development**

Music forms an integral part of the socio-cultural dynamics of the Ghanaian culture; from cradle to grave, music forms a symbiotic part of our daily activities. The social value placed on music cannot be overemphasized. The different ethnic groupings in the country exhibit a variety of music performances and style that uniquely define them. The numerous festivals in Ghana provide the platform for each traditional area to showcase their richness in music.

Ghana is known traditionally for its music and culture which also partly defines our values and origin. Traditional music (otherwise known as folkloric music) is embedded in our daily activities. Each community since time immemorial has evolved with a unique style of song for occasions such as festivals, funerals and naming ceremonies. Aside the traditional folkloric music, several other genres have emerged. Table 3.4.4 presents the various music and dance associated with the various regions in Ghana.

Table 3.4.4 Music and Dance by Regions

Region	Music and/or Dance

[3] An analysis of the population according to age groups and regions is performed and presented in Appendix D (*Source: GSS, 2010 population and housing census & KPMG Analysis)*

Greater Accra	Kpanlogo, Kpatsa, Gome, Tokoe, Fume, and Kolomashie
Ashanti	Adowa, Kete, Nnwomkro, Fontofrom, Mpre, Sikyi, Ntan, Shrine music, and Asaadua
Volta	Borborbor, Gota, Gbalo, Gahu, Tro-u, Sowu, Agbaza, Adzogbo, Atsiagbekor, Babasiko, Gadzo, Akpese, Gbedze, Atrikpui
Eastern	Apiridwa, Klama, Agbaei, Gyewani
Northern	Bamaaya, Jira/Jera, Bambaya, Goonji, Takai, Kinatsu, Nmane & Tora
Western	Kundum, Abisa
Central	Asafo, Adzewa, Adaha, Coastal Fante Osibisaaba

Source: KPMG research and analysis

As the table above depicts, each society in a particular region has a unique type of dance or music that is associated with it. The Volta and the Ashanti regions appear to be the regions well endowed with traditional songs and dance.

3.5 Technological Factors

Ghana has grown to become a major centre of technology in West Africa with increased usage of the Internet and other communication applications. This has made access to information and exchange of information easier and faster. The country can now boast of six telecommunication companies offering mobile and fixed lines telecommunication services. According to National Communication Authority (NCA), mobile penetration as at December 2013 stood at 100.41% which has created opportunities for people to communicate and improve upon their operations.

Following the government's vision of building a National Fibre Communication Backbone Network, three telecommunication networks have landed fibre cables. They are the Sat 3 cable by Vodafone, GLO mobile fibre-optic and Main One cable. A forth network, MTN has been licensed to provide a fibre-optic cable. The impact of these developments is an increase in access to telecommunication facilities such as internet. Additionally, three companies have been licensed to provide the 4G Long-Term Evolution (LTE) service, a faster data service than the conventional 2G and 3G services. These will facilitate music download creating a more active virtual market for musicians.

3.6 Country Outlook

- **Political Outlook**

The 2012 elections have reinforced Ghana's position as a stable and maturing democracy in the region despite the challenging of the election results in court. This has further bolstered its reputation as an investment destination. It is expected that Ghana will remain a top regional performer in terms of political and investment stability over the medium-long term

- **Economic Outlook**

Outlook for Ghana's economy remains buoyant as the government embarks on tight fiscal policies. The inflow of oil revenue and favourable gold prices are all expected to underpin the positive outlook. According to IMF, real GDP growth is expected to slow down in 2015 at a rate of 5.5%. However, GDP per capita will continue to increase in 2013 to a figure of US$2,022 in 2015. Inflation is also expected to remain at a single digit from 2014 to 2017.

Table 3.6.1 shows a forecast of economic indicators for the next five years according to the IMF.

Table 3.6.1 Economic indicator's forecast

Indicator	2014	2015	2016	2017	2018
GDP at Constant Prices (GH¢ billion)	73.8	77.9	81.9	86.0	92.8
GDP at Current Prices (GH¢ billion)	105.8	122.8	141.11	160.1	185.6
GDP at Current Prices (US$ billion)	49.8	54.3	59.11	63.7	70.4
Real GDP Growth Rate (%)	6.1	5.5	5.07	5.06	7.9
GDP per Capita (GH¢ at Current Prices)	4,037.4	4,568.6	5,117.4	5,662.9	6,400.0
GDP per Capita (US$ at Current Prices)	1,902.8	2,022.1	2,143.8	2,255.3	2,428.1
Average Inflation (%)	9.8	8.2	7.5	7.2	6.9
Gross National Savings (% of GDP)	10.2	10.7	11.3	11.4	13.0

Source: IMF

- **Social Outlook**

Ghana’s population is increasing rapidly with a significant proportion of them expected to be youthful. The westernization of Ghanaian culture as a result of the influence of expatriates and Ghanaians returning from abroad is expected to influence the entertainment and arts sectors. The music sector thus has a lot of potential within the near future.

- **Technological Outlook**

Information Communication and Technology (ICT) infrastructural development in Ghana is progressing rapidly. Several initiatives have been made by the Government of Ghana and other agencies to develop the ICT-infrastructure. Prominent among these initiatives is the development of a national fiber optic network (VOLTACOM).

There have also been massive investments in ICT infrastructure from existing Internet Service Providers (ISPs) and Telecommunication companies, in addition, the government of Ghana and other agencies, have trained over a thousand professionals in ICT and related areas to provide the necessary knowledge base and skills to support ICT activities in the country.

According to the Ghana Investment Promotion Centre (GIPC), the Kofi Annan ICT Centre of Excellence has been commissioned with the responsibility to produce the human capacity needed for the emerging ICT Industry in Ghana. With ICT advancement in Ghana, it is expected that there will be improvement in business operations especially in the area of e-business. These advancements will play key roles in the music industry’s development such as using the social media as a platform to market products and adopting cost-effective music production methods.

3.7 Conclusion

Ghana's reputation for political stability remains intact following the December 2012 elections and the nation is widely regarded as a safe place to do business. Even though the 2012 general elections were challenged, the verdict delivered by the Supreme Court entrenched Ghana’s political achievements. Looking ahead, we expect investment in Ghana to hold up over the medium term given the strong growth outlook, decent business environment and wealth of investment opportunities.

Key economic indicators show a relatively stable condition even though exchange rate fluctuation threatens the gains made so far. Ghana is undergoing a multi-year economic boom fuelled by the burgeoning oil & gas sector. The nascent oil and gas sector is attracting a lot of foreign investment.

The current stable macro-economic environment together with the inflow of foreign investors into the country gives credence to the number of major projects in both the public and private sectors. The government of Ghana is placing renewed attention on the creative sector in general and the music sector in particular.

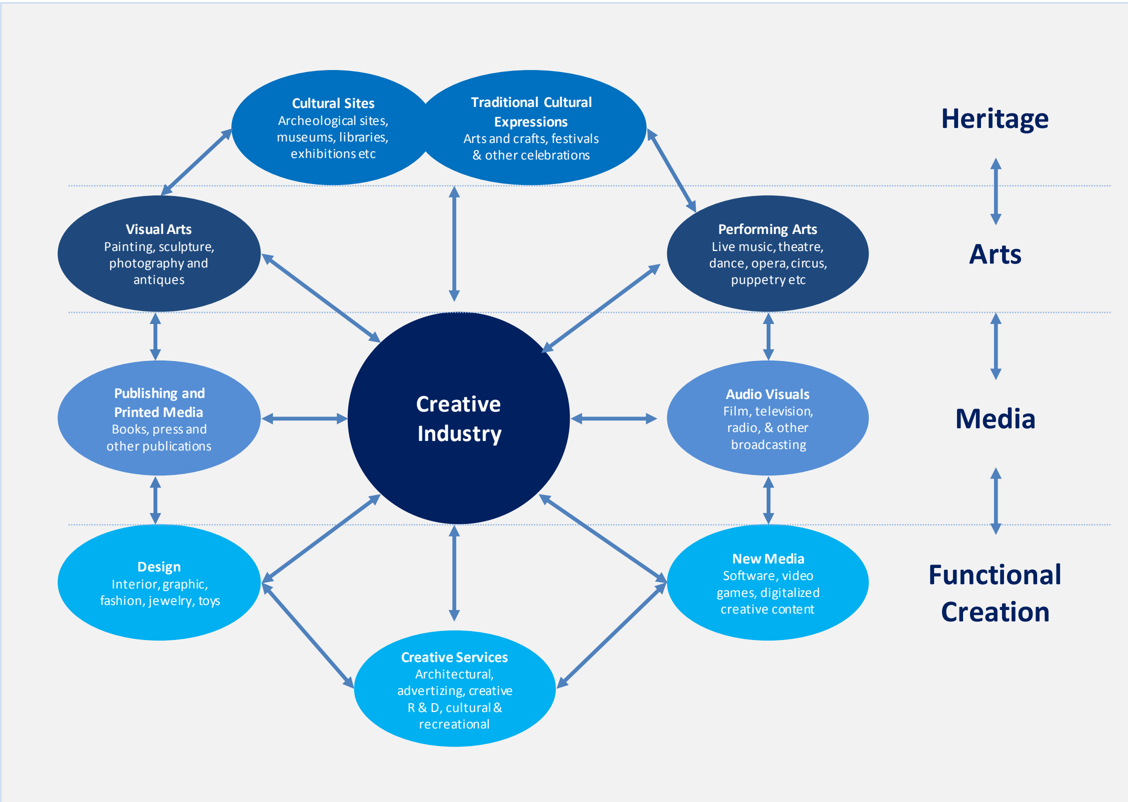
4 The Creative Industry in Ghana

4.1 Overview

The creative art industry encompass among others the advertising, architecture, art, crafts, design, fashion, film, music, performing arts and publishing ventures. There is a symbiotic relationship between the various sectors; for example there is a strong relationship between music and performing arts and also between music and the film industry. Music can therefore be considered as central to the creative arts industry and indeed all facets of human endeavour.

The United Nations Conference on Trade and Industries (UNCTAD) provides one of the most comprehensive definitions of creative industry. This is depicted in the diagram below:

Figure 4.1.1 Overview of the creative industry in Ghana



Source: UNCTAD, Creative Economy Report, 2010

4.2 Characteristics of the Creative Industry in Ghana

4.2.1 Overview

The creative sector in Ghana covers the following nine domains namely; Cultural Sites, Visual Arts, Traditional Cultural Expressions, Performing Arts (Dance, Drama and Music), Publishing, Audio Visuals, New Media, Design and Creative Services.

Table 4.2.1 Characteristics of the creative industry in Ghana

Domain	Brief Description
Cultural sites	This domain is functional with a number of archaeological sites in Ghana. The study of archaeology in the country's tertiary institutions appears to encourage archaeological excavations in various regions of Ghana. Ghana has a National Museum and Monument Board with the mandate to acquire, protect, conserve and document the Nation's movable and immovable material cultural heritage for posterity, for the purposes of research and education of the public. The Ghana Library Board (GLB) was also established with the aim of promoting education through the provision of reading materials such as books, periodicals and other non-book materials. There are also a number of private/NGO music archives operating in the country such as the International Centre for African Music and Dance, the BAPMAF (Bokoor African Popular Music Archives Foundation) Highlife Institute and the African heritage Library all in Greater Accra and the Adadam Cultural Resource Centre in Kumasi.[4]
Traditional cultural expressions	Ghana has diverse cultural practices which are expressed in various forms such as handicrafts, cloth and festivals. Each community has its unique cultural practices as well as festivals that are used to express the values of a society. Aside the unique festivals that are organised, the National Festival of Arts and Culture (NAFAC) is organized once a year to showcase the nation's rich cultural heritage.
Visual arts	This forms one of the functional domains of the creative industry and has prominence in the educational system of Ghana. A number of professionals have been produced within the various disciplines such as painting, weaving, pottery and sculpturing/carvers.
Performing Arts (dance, drama and music)	This arguably may be the largest domain in terms of the number of professionals operating in the three sub-domains. The country has a functioning performing arts sector with a few institutions offering programmes in performing arts at the tertiary level. The National Dance Company (also known as the National Dance Ensemble) has also been set up to provide cultural displays during national events. A union, the Musicians Union of Ghana (MUSIGA) has been established to seek the welfare of members. Also a collective management society, the Ghana Music Rights Organization (GHAMRO) has been established to oversee the administration of royalties.
Publishing	The publishing domain has not seen much activity over the past decade with a few publishing houses currently in operation. Historically, the

[4] Details of some private/NGO music archives in Ghana are presented in Apppendix C

Domain	Brief Description
	Christian publishing houses such as the Presbyterian Book Depot and the Methodist Book Depot have been at the forefront of book publishing. However, it appears in recent times most of these depots have turned into sales outlets for sale of books. The dominant publishing houses include Asempa Publishers, Assembly Press, Readwide Publishing, EPP Books, Sub-Saharan Publishers and Anansesem Press.
Audio visuals	The film industry is one of the sub-domains gradually developing with local and international collaboration in the production of films. The Ghana Actors Guild was formed to seek the welfare of actors in Ghana. Music video production is gradually growing and has become another means of marketing music. The domain also hosts television and radio stations, which are regulated by the National Communications Authority (NCA) and the National Media Commission (NMC). Currently, according to the NCA, there are 28 licensed television stations and over 200 radio stations across the country. The Ghana Independent Broadcasters Association (GIBA), comprising radio and TV stations, has been formed to promote independence of members.
Design	Ghana boasts of rich textile industry in the recent past with the existence of a number of factories such as the Akosombo Textiles Limited and the Juapong Textiles. Other sub-domains that could be identified in Ghana include jewellery and interior design.
Creative services	Creative services in Ghana are dominated by architectural and advertising services. The Institution of Architects in Ghana is the professional body that regulates the services provided by architects in Ghana. The country boasts of tertiary institutions dedicated to producing well-trained and qualified architects. Within the advertising sub-domain, the Advertisers Association of Ghana brings together professionals in advertising together. Advertisement produced in Ghana range from electronic to the print media and large billboard. Other sub-domains such as R & D and recreational are at their development stage.
New media	This domain is still at the development stage with few local firms venturing into the development of software programmes. These software programmes are designed to address accounting needs of the business environment. Video games, though popular with consumers, development is yet to take place in Ghana. However, there is some presence of Ghanaian music on the internet and other social media (Facebook, YouTube etc).

Source: KPMG analysis & Medium Term Strategic Plan for the Creative Industry (2010 – 2013)

4.3 Conclusion

The creative industry in Ghana largely exhibits the features found within the UNCTAD structure in the report released in 2010. The most active domains are performing, audio visual, visual art and publishing. The other domains such as the new media and R & D are at the development stage. It is envisaged that the injection of capital into the sector is likely to release its economic potential.

5 Music Sector Overview

5.1 Historical Perspective

5.1.1 Overview

Music can be divided into genres and subgenres, although the dividing lines and relationships between music genres are often subtle, sometimes open to personal interpretation, and occasionally controversial. The musical genres heard in Ghana have been grouped under six broad categories- traditional, contemporary, gospel, imported, choral and brass band categories. These musical categories are composed of various genres and subgenres. The traditional music per its natural inclination must be biased towards specific traditions and is as such discussed with certain ethnic groups as examples.

5.1.2 Music Genres[5]

Traditional Music

Ghana is home to numerous ethnic groups and is endowed with a strong presence of multiple cultures and myriads of styles of traditional and modern music. Traditional music in Ghana is based on two factors: ethnic groups and geography and may thus be grouped mainly into the forested southern coastal group and the northern savannah group. Traditional music of Ghana is passed down orally from generation to generation and the authors of the songs are usually unknown (Nation, 2006).

The southern parts of Ghana are inhabited by ethnic groups speaking languages that belong to the broad Kwa (such as Akan) and Gbe language groups. The music of the southern groups are highly associated with social gatherings, spiritual and ritualized events occurring at funerals, festivals, weddings, out-doorings and other public and private gatherings. They rely on complex polyrhythmic patterns played by drums and bells, as well as a stronger emphasis laid in harmonized songs. The Akan tradition of griot praise-singing with the 10 to 14 string Seperewa harp-lute is the only exception. Along with its musical genre, it is now rare and it is gradually being replaced by the acoustic guitar. Akan and Ga ethnic musical genres, including Fante, Ashanti and Akuapem groups are southern part groups known for complex court music, including the Akan Atumpan and Ga Kpanlogo styles, and a huge log xylophone used in Asonko music. (Nation, 2006)

Ewe musical genres, whose folk styles are related to the music of Benin and Togo, have also contributed popular styles, especially the agbadza and borborbor, a fusion of traditional Ewe recreational drum music and konkoma highlife invented in the early 1950s in the Kpandu area. Ewe music is percussion-driven, rhythmically complex and mostly dance-oriented. The central instruments of Ewe music are gongs (*gankogui* and *atoke*), rattles (*axatse*) and drums. Drums are classified according to their size: small (*kaganu*), medium-sized (*kidi*), large (*sogo*) and very large (*atsimevu*). The *sogo* and the *atsimevu*, together with the *agboba*, are the most frequent master drums, which lead the ensembles. The instrumentation varies depending on the occasion, except for the *gankogui*, which is the backbone of all traditional Ewe music, as it is responsible for maintaining the tempo and providing the staggered cues for the various polyrhythmic drum patterns.

People of the northern regions base musical composition on stringed (such as the Kologo lute and gonjey or gonje/goje   one stringed fiddle), wind, melodic as well as complex polyrhythmic composition with a variety of drums (talking drum, gourd drum or *brekete*) and bells. As with other Gur

[5] The impact of colonialism on the musical genres is presented in Appendix C

and Mande groups in West Africa, a long history of griot praise-singing traditions exists among the various groups in Northern Ghana. Northern music is mostly set to a minor pentatonic scale.

North and north-eastern Ghana is known for talking drum ensembles, goje fiddle and kologo lute music, played by the Gur-speaking Frafra, Gurunsi and Dagomba nations as well as by smaller Fulani, Hausa, Mande-speaking Busanga and Ligbi peoples. The lunga (talking drum) and the gungon (bass drum) are the most essential types of Dagomba drums.

Upper-North-western Ghana is home to the Dagara, Lobi, Wala and Sissala peoples, who are known for complex interlocking Gyil '(wooden xylophone) folk music with double meters. The musical traditions of the Mande Bissa and Dyula minorities in this area closer resemble those of neighbouring Mandinka-speaking areas than those of other Upper-North-western groups.

- Palm Wine Music

Palm Wine music developed in the early 20th century in the British-colonized and Anglophone areas of coastal West Africa, i.e., in what are now Sierra Leone, Liberia, Ghana and Nigeria. Palm Wine Music is a fusion of the African Folk Music of the region with imported Caribbean Calypso and the music of West African sailors. The basic instrumentation is finger style guitar, percussion and vocals, but other instruments are often added as well. Palm Wine Music has been very influential in the development of Ghanaian highlife, Nigerian juju-music and Sierra Leonean Maringa.

Important and exemplary artists include Ebenezer Calendar and S.E. Rogie from Sierra Leone, and Kwaa Mensah and Koo Nimo from Ghana and Tunde King and I.K. Dairo of Nigeria.

- Occupational Songs

Occupational songs have been a prominent part of labor intensive jobs, and some are very commonly known. Cultures use the work songs to keep beat, motivation, and to help them continue to endure the work by serving as a distractive stress releaser. Most of the tunes are just plain great for work. They have catchy tunes, or they match the rhythm of the work exceptionally well, or they have exceptionally sweet harmonies. Examples are the Post Office worker “Stamp Canceling” song, that was used to make work easier and faster and the fishermen songs that made them keep pace as they worked together to pull in the nets, and row the boats. The songs the fishermen sung expressed their communal habits and talked about those who slept and sometimes even question authority.

Contemporary Music

Contemporary music from Ghana is mostly comprised of 'Highlife' and 'Hiplife' musical styles as well as the newer and wildly popular Azonto and Al-kaeda (dance-styles).

- Highlife

Highlife originally began in the coastal areas of Ghana, Sierra Leone and Nigeria as a blend of brass band music with local recreational songs, West Indian Calypso, Latin music and the music of African sailors. Its roots can be traced back to the 1880s Fanti adaha marching bands music and a little later the sailor influenced palm wine guitar groups such as the Fanti group led by Kwame Asare (aka Jacob Sam) that was recording by the 1920s. (Collins, 1996)

It takes a traditional percussive beat and fuses it with various rhythms - especially from gombe/goombay drumming, ashiko, osibisaaba and palm wine guitar-styles, European brass bands and sea shanties. The name ‘highlife’ itself was coined in Ghana in the 1920s when local popular street music (like ashiko, adaha and osibisaaba tunes) were first orchestrated by the high-class ballroom dance bands that catered for the lavish events of the local African elites. Highlife music is the most popular genre to have originated in Ghana and was first recorded in 1920's and reached its popular peak in the 1950's through 70's. During World War II swing-jazz was introduced by UK and US servicemen based in Ghana, which resulted in a jazzy form of highlife being pioneered from the late 1940s by the Tempos dance bands that was led by E.T. Mensah and included Tommy Grippman, Joe Kelly and also the groups drummer Kofi Ghanaba. Ghanaba (aka Guy Warren) was responsible for introducing Latin percussion instruments (congas and bongos) to the Tempos, before moving on to the US in the mid 1950s to create his own unique blend of Afro-jazz (Collins, 1996).

From the end of the 1950s the highlife genre became more influenced by a succession of imported music styles such as rock, soukous, soul, funk, disco reggae and hip hop. Some pioneers of highlife are Kwame Asare, E.T. Mensah (Tempos band) , King Bruce (Black Beats) , Kwaa Mensah and E.K. Nyame, whilst later exponents include Nana Ampadu (African Brothers) , J. A. Adofo (City Boys) , A. B. Crentsil, Blay-Ambolley, Osabea Cropper, Amakye Dede, Nana Acheampong, Bessa Simons, Nat Brew, Rex Omar and Daddy Lumba. Highlife has paved way for newer genres like Hiplife and the globally better known Afrobeats. (Collins, 1996)

Two main forms of highlife had emerged by the middle of the 20th century, the dance band and the guitar band variety. For the guitar bands, it was E. K. Nyame who was particularly important as though he sang in Twi he added the double bass, Afro-Cuban percussion and other jazz and Latin dance bands instruments to his group on the recommendation of his producer and manager, E. Newman-Adjiri. When E.K. Nyame formed his Akan Trio in 1952 he also started the trend of linking highlife guitar bands to the local concert party popular theatre groups. The guitar bands and concert groups went on extended tours of Ghana and played for the urban and rural poor. By the late 1960s there were almost 100 concert guitar bands that were into playing for villagers through extensive tours of the country using electric instruments. On the other hand the highlife dance bands like the Tempos, Black Beats, Jerry Hansen’s Ramblers International and Stan Plange’s Professional Uhuru Dance Band played for more prestigious urban audiences. Both guitar band and dance band highlife artists supported the independence struggle and indeed the jazzy highlife sound pioneered by E.T. Mensah’s Tempos became the sound symbol and ‘sound track’ of the early independence era, in both Ghana and Nigeria. (Collins, 1996)

President Kwame Nkrumah, who led Ghana into independence, was overthrown by a military coup in 1966. This upheaval and particularly the military era beginning in the early 1970 through to the 1980s saw many Ghanaian musicians who had flourished in the 1960s and early 70s emigrating. Many moved to the United States of America, the United Kingdom, Germany, Canada, Switzerland and many other countries. As a result in the early 1980s The Ghanaian-German community created a disco music form of highlife called Burger highlife. The most influential early burger highlife musician was George Darko. Burger highlife was extremely popular in Ghana, especially after computer-generated dance beats were added to the mix. The same period saw a Ghanaian community appear in Toronto and elsewhere in Canada. Pat Thomas was probably the most famous Ghanaian-Canadian musician. Other émigrés include Ghanaian-American Obo Addy, the Ghanaian-Swiss Andy Vans and the Ghanaian-Dutch Sloopy Mike Gyamfi and the band Kumbi Salleh. The London based Hi-Life International led by Kwabena Oduro-Kwarteng was probably the most internationally recognised Ghanaian highlife band in the 1980s. Other notable artists abroad in the 1980s and 90s (some are still there) include Kari Bannerman, Charles Amoah, the Lumba Brothers, Ben Brako., Charles Tetteh, Chikinchi, McGod, Rex Gyamfi, Albert Jones and Nana Aboagye Da Costa - and the late Jon K and Khodjo Aquai. (Collins, 1996)

As mentioned earlier pop music began to exert an influence on local Ghanaian artists from the 1960s on- and this included Rock n’ Roll music and the Soul and Funk music of James Brown and others. In 1971 a musical festival called “Soul to Soul” was held in Accra featuring performances from a number of US artists, such as the soul artists Wilson Pickett and Ike and Tina Turner as well as the Latin-Rock group of Carlos Santana. Subsequently, bands were set up that combined highlife with rock, soul and funk music into various Afro-pop styles. There was the ‘funky highlife’ of Ebo Taylor and Blay-Ambolley and the ‘Afrobeat’ of Nigeria’s Fela Kuti. It was the London based Ghanaian super-group Osibisa that pioneered Afro-rock and became the country's biggest export. The band, whose name is derived from the old Fanti name for highlife ‘osibisaaba’ was formed in London in 1969 by three Ghanaian musicians and the same number of Caribbean artists and a Nigerian. The Ghanaian band members were all ex highlife dance band artists in Accra and Kumasi who moved to London after Nkrumah's regime was overthrown. In fact Teddy Osei was already in the UK having obtained a scholarship from Nkrumah to study there. Osibisa produced a string of records hits and their Afro-rock instrumentals were interlaced with African chanting amidst a backdrop of percussion instruments and a horn section. The band's rise to prominence created an interest in African music among European and American listeners, raising the profile of Ghanaian music worldwide in the process. After the rise of the Afro-rock, Afrobeat and funky highlife of the early 1970s, came the Jamaican reggae music of Jimmy Cliff and Bob Marley that inspired a new style of fusion music in Ghana from the 1980s that is associated with, for instance, Kwadwo Antwi. The 1990s saw a new imported music that affected the local music scene – namely American hip-hop and rap that resulted in Hiplife. Both reggae and hip-hop are discussed later.

- Hip-life

During the late 1990s, the youth of Ghana incorporated American Hip-Hop and Rap influences to establish a newer hybrid genre, known as Hiplife. The originator of this style is Reggie Rockstone, a Ghanaian musician who dabbled with hip-hop in the United States before finding his unique style. Hip-life basically was hip-hop in the Ghanaian local dialect backed by elements of the traditional Highlife. He has cited this as one of the main reasons behind his success. For many years, Highlife was the preferred music genre until the introduction of Hiplife. Hiplife has been popularized by artistes such as Reggie Rockstone, Obrafour, Akyeame (the duo now solo artiste Okyeame Kwame), Tic Tac, Lord Kenya, Kwaw Kese, Obour, Ayigbe Edem, Ko-Jo Cue, Asem, Samini, VIP, Praye, Castro, K.K. Fosu and Sarkodie. Music producers responsible for steering this genre to what it is today were Zapp Mallet, Jay Q, Panji Anoff, Hammer of The Last Two, Morris De' voice, Richie Mensah, Appietus, Killbeatz and EL. It is by far the most popular style of music among the younger people of Ghana.

The continued popularity of hip-hop worldwide, particularly within the African Diaspora, has led to links between Ghanaian artists and British musicians.

Gospel Music

The political instability and an economic downturn in Ghana from the late1970s 'kalabule' era of Colonel Acheampong's military government and the curfews of the early Flight-Lieutenant Rawling's government prompted a surge in religious activity in Ghana during the 1980s. Music resources and artists shifted from nightclubs to churches as with their donations from home and abroad and charitable status they were able to operate as compared to commercial music group that depended on gate fees and imported musical equipment. As a result the highlife artists Kofi Abraham and Love Nortey began fusing Christian music with highlife and other forms of popular dance music. Some of the commercial highlife artists who moved (in varying degrees) into gospel from the 1980s were C.K. Mann, A.K. Yebuah, Kofi Sammy, T.O. Jazz, F. Kenya, Anthony Scorpion, Kofi Ani Johnson, Jewel Ackah, Papa Yankson, A.B. Crentsil, J. A. Adofo, Safohene Djeni, K.K. Kabobo and Nana Ampadu (Collins, 1996).

By the 1980s Gospel music was becoming increasingly popular and the local spiritual, Pentecostal and Charismatic churches were producing their own top band and artistes such as Mary Ghansah, the Tagoe Sisters, Ola Williams, Stella Dugan, the Genesis Gospel Singers and Reverend Yaw Agyeman Baidoo. By the 1990s gospel music was firmly rooted and boasted a whole infrastructure of recording studios, radio stations, gospel music unions, awards nights and promotional outfits. Some of the top bands/artists of this period were Diana Akiwumi (now Diana Hopeson), the Soul Winners, Michael Kojo Bonsu, Suzzy and Matt, Reverend Owusu Ansah, Cindy Thompson, Helena Rhabbles, Yaw Sarpong, Jane and Bernice, Esther Smith, Joe Beecham and Amy Newman with – many more being added in recent years. One noticeable fact is that women now play major roles singing in this religious popular dance genre (Collins, 1996).

Imported Music

American Pop, Hip-Hop, Rhythm and Blues (R and B), Jazz and surprisingly Country are some of the most encountered contemporary music imports heard in Ghana in the larger towns and cities. Some contemporary French music will be heard closer to the Cote d'Ivoire and Burkina Faso borders. Styles of nearby countries can sometimes be heard, especially closer to the borders; Mapouka from Cote d'Ivoire, Afrobeat from Nigeria, Griot and Mbalax from Mali among others.

Afrobeats (not to be confused with the Afrobeat of Fela Kuti that has no 's' at the end) is a style of Dance-Pop that originated in West Africa during the early 2010 including elements from Pop Rap, Contemporary R & B and Dancehall. It is also influenced by popular West African styles such as Hiplife and Coupé-Décalé, even though it is musically not strongly rooted in traditional African music. The genre has been especially popular in Nigeria and Ghana, but has also broken through in the United Kingdom with a local UK Afrobeats scene influenced by early UK Funky. D'Banj's single Oliver Twist was the first international Afrobeats hit and led the way for greater exposure of the style. Other prominent artists include Sarkodie, Efya, Fuse ODG and P-Square.

Reggae also grew steadily more popular during the 1980s, prompting some highlife acts to crossover. Reggae is by far the most popular non-American style in Ghana. There is amongst the reggae loving Ghanaian youth an enormous interest in the Rastafarian movement, a Jamaican religious movement that in the 1970s became connected with that country's popular reggae music. The country's reggae scene, which came to prominence in the 80s, also continues to grow from strength to strength. Artists such as Rocky Dawuni, Kwadwo Antwi and Shasha Marley attract a devoted following. The popularity of Caribbean music has led to the emergence of a new genre called Raglife. This sound fuses Ragga and Reggae with Hiplife. The star of Ghana's Raglife scene is a multi award-winning artist called Samini.

Choral Music

A body of singers who perform together as a group is called a choir or chorus. The former term is very often applied to groups affiliated with a church and the second to groups that perform in theatres or concert halls, but this distinction is far from rigid. Choirs are often led by a choirmaster. In Ghana, the origin of choirs could be traced to the influence of missionary activities in the 19th century. The traditional orthodox missions such as the Presbyterian Church, Methodist Church and the Catholic Church were noted for their westernized choral singing of hymnals. The beginning of the 20th century saw new church movements such as the Pentecostals and the Charismatic churches also blending the orthodox style of worship with more African based styles that include drumming, swaying and the clapping of hands (Agordoh, 2000). Charismatic churches have also blended this style of worship with American based gospel music styles.

Choral music genre has gained popularity in Ghana over the past century with well-known choral groups performing both in Ghana and abroad. Aside the traditional choirs found in orthodox churches, there are those formed in communities and work places that perform at various national and international choral festivals. Notable among these are the Winneba Youth Choir, Tema Youth Choir, Fire Service Choir and the Ghana Broadcasting Corporation Choir.

Brass Band Music

A brass band is a musical ensemble generally consisting entirely of brass instruments, most often with a percussion section. Ensembles that include brass and woodwind instruments can in certain traditions also be termed brass bands (particularly in the context of New Orleans-style brass bands), but may more correctly be termed military bands, concert bands, or 'brass and reed' bands. Renowned brass bands in Ghana are typically with the military or the services, particularly the Army, Navy, Air force, Fire service etc.

In West Africa, at the beginning of the 20th century , the only instruments in use in the military were the Fife and the Bugle gathered in ensembles known as Corps of Drums basically meant to supply rhythm to the West African Frontier Force in the then Gold Coast. Gradual enhancement of the quality of music was characterized by the introduction of additional instruments, raising these musical ensembles to Regimental Band status in 1930. Since then compositions and repertoires have been Western oriented. Local tunes have gained acceptance particularly within the last thirty years. However, as far back as the 1940s some konkoma highlife marching songs were being used by the Ghanaian army. For the military musician, training is part of the career.

At the regimental status, the military band has three main components;

- The Woodwind consist of flutes/piccolo, oboe, large number of clarinets, saxophones of all kinds and bassoons.

- The Brass instruments encompass the trumpets/cornets, horns, trombones and tubas.
- The Percussion instruments include the drum family – the bass drum, side drum, cymbal timpani and others.

The Armed Forces Central Band traces its origins to the West African Frontier, as do all other major units in Ghana Armed Forces. The only instruments used by the squad were the flute and the bugle. During the reign of Queen Victoria, it was decided that the band be enhanced and additional instruments introduced. Consequently, four bandsmen; Sunkwa Dagarti, Abudulai Dagarti, Mama Kanjaga and Sualai Sisala were sent to the royal Military School of music in the United Kingdom for six years instrumental course. Some Cameroonian soldiers, captured as prisoners of war during the First World War by the Gold Coast regiment had among them bandsmen trained by the Germans. The well - trained Cameroonian bandsmen with proven oral and practical skills joined their Gold Coast counterparts and placed their expertise at the disposal of the Ghanaians and this helped in equipping them technically and theoretically. Most of these trained bandsmen who were due to go on retirement were made to train one or more bandsmen to acceptable standards when the world war was over before they were released.

As mentioned earlier, in this document, it was the regimental brass band trained Ghanaian musicians who in the late 19th century created the earliest form of highlife music (in the Cape coast/El Mina) area called 'Adaha'. Then in the early 1900s an even more Africanised form of Adaha band music was created called 'Konkoma' (or Konkomba), a poor man's form of marching music that did away with the expensive imported brass band instruments, making do rather with local drums and voices.
At the moment, the band contributes bandsmen to five United Nations Peacekeeping duties with appreciable results in raising the morale of not only Ghanaian troops but of other foreign battalions as well in the operational area.

In all, almost thirty bandsmen are selected from Central, Army, Navy and Air Force Bands to form a task force band for each Ghanaian Battalion on peacekeeping duties which has raised the morale of bandsmen beyond the former efficiency level during the initial nomination of six bandsmen. There is an opening for higher education and bandsmen are always encouraged to improve their educational standard.

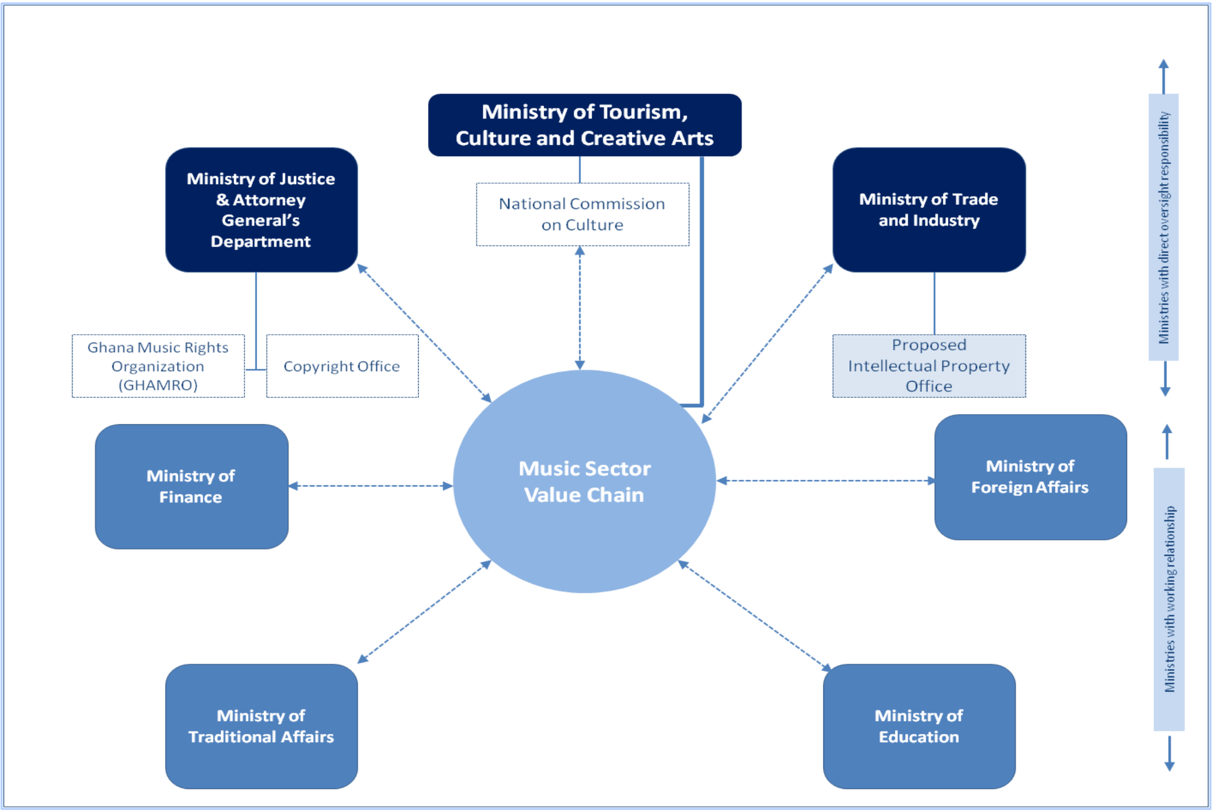
The band was restructured from corps of drums to a regimental Band in 1927. Bandsmen were taught how to read music and to play musical instruments. Although most of the bandsmen were illiterate, they were taught how to learn musical notes and with time they became proficient and filled the vacuum created by the retired bandsmen.

5.2 Industry Oversight[6]

The music industry has always operated under various ministries or commissions in the past years. The sector union tended to deal with various ministries and agencies in the organization of its activities. Figure 5.2.1 presents the interrelationship between the various government ministries and the sector unions, associations and groups.

[6] The functions and mandate of the various ministries were sourced from the official website of the Ghana Government

Figure 5.2.1 Music industry oversight



Source: KPMG Analysis

- **Ministry of Tourism, Culture and Creative Arts**

The Ministry of Tourism, Culture and Creative Arts (MTCCA) originally known as Ministry of Tourism was created to ensure the development and promotion of tourism and improvement of the capital city on a sustainable basis. This aimed at optimising the socio-economic growth and positive environmental impact for the benefit of deprived communities in particular and the country at large.

Recent administrative changes in ministries resulted in decoupling the culture component from the Ministry of Culture and Traditional Affairs to be attached to the Ministry of Tourism. Since MTCCA is created to promote tourism, it is envisaged that the creative works of Ghanaians including music will be promoted through diasporan relations and activities that draw tourists into the country. Currently, the MTCCA is in the process of reviewing its vision and mission to cater for the creative arts sector. It is expected that a creative arts desk will be set up to liaise between the sector and policy making.

- **Ministry of Trade and Industry**

The Ministry of Trade and Industry (MOTI) has the overall responsibility for the formulation, implementation and monitoring of Ghana's internal and external trade. It is the sector Ministry that ensures that Ghana derives maximum benefit from internal trade relations and that domestic trade is conducted in a smooth and orderly manner. MoTI is directly responsible for music related exports such as local instruments.

Aside this, the Ministry with assistance from the Swiss government has set up a unit to responsible for developing the framework for intellectual property (IP). To this end, the National Intellectual Property Policy and Strategy document has been developed to protect the rights of owners. The project seeks to create a common platform where copyright and industrial rights (patent, trademarks etc) will be harmonized.

- **Ministry of Justice and Attorney General**

The Ministry exists to entrench at the core of the body politic and abiding respect for the rule of law and a constant observance of human rights, to ensure equality of access to justice and treatment before the Law for all citizens, to promote by law social justice to facilitate the operations of a fair, efficient and transparent legal system and to propagate a culture of due process and legality for these purposes.

To specifically address issues related to the music industry, Ministry of Justice and Attorney General (MJAG) works through its legally mandated body, the Copyright Office to protect the rights of musicians. The Copyright Office was established under the Copyright Act 2005 (Act 690) as amended in 2009, to among other things administer copyright and to redress any copyright related issues. The Office is directly responsible for protecting the right of music composers and also fighting the piracy menace.

The Copyright Act and the subsequent Regulations provide for the establishment of collective management societies by the authors of musical works. The Ghana Music Rights Organization (GHAMRO) has been set up to administer the rights of music authors, publishers, performers and producers. GHAMRO is licensed by the MJAG for a renewable period of two years.

Apart from the three ministries discussed above, there are four other ministries that are seen to have collaborative relationships with the music sector. These are discussed below.

- **Ministry of Finance**

MoF is responsible for the administration of taxes in the country. It performs this function through the Ghana Revenue Authority (GRA), a body authorized by law to administer taxes. The Ministry through the Customs, Excise and Preventive Service division is responsible for imposing duties on imported devices used for storage and copying of music in Ghana. Currently, there is an “Entertainment Tax” which is charged on events. The tax requires some event organizers to prepay the tax at the start of the event. Well established event organisers however pay Value Added Tax (VAT) on ticket sales after the event.

- **Ministry of Foreign Affairs & Regional Integration**

MFA exists to promote and protect the interest of Ghana and its citizens abroad and to enhance Ghana's security and prosperity. The Ministry’s core function is to advise and assist Government in the formulation and implementation of Ghana's foreign policy objectives, including through proffering advice on policy option in response to unfolding international situations and events. One of the of the objectives is to promote Ghanaian exports, tourism potential, attracting foreign investment for Ghana and enhancing scientific, technological and cultural links between Ghana and other States. It is in the light of this objective that the Ministry collaborates with the music sector in organising foreign tours and festivals. The GSGDA has as one of its strategies to promote the establishment of culture and business desk in the diplomatic missions abroad.

- **Ministry of Chieftaincy and Traditional Affairs**

The Ministry of Chieftaincy and Traditional Affairs used to be the Ministry of Chieftaincy and Culture until the culture aspect was decoupled from it. The Ministry exists to sustain and integrate the regal, traditional and cultural values and practices to accelerate wealth creation and harmony for total national development. Music remains an intrinsic part of the traditions and the chieftaincy institutions. The Ministry is thus seen to be a collaborative body that assists the promotion of traditions through music to the outside world.

- **Ministry of Education**

The Ministry is committed to put in place an education system focused on promoting creativity and problem-solving through the development of academics, technical and vocational programmes that will improve the acquisition of skills and assure job-market readiness. The Ministry is thus responsible for developing curricula for the basic and secondary schools. Over the years, it has spearheaded educational reforms which resulted in music being merged into cultural studies and eventually into creative arts. The lack of prominence for music education in the second cycle schools has been adduced as one of the limiting factors for the human resource development for the music sector.

5.3 Professional Organizations

The music sector has a plethora of bodies, associations and groups with diverse interest and objectives. The sector has gone through number of phases with the formation of professional groupings to advance the ideals of the members. This, some experts believe, could also account for the myriad of challenges the sector faces. This section presents a discussion of some of the bodies.

5.3.1 Creators Associations

This is composed of associations bringing together lyricists, composers, performers, and songwriters. Currently, there are six associations and one union.

Union

- Musicians Union of Ghana (MUSIGA)

Associations

- Professional Musicians Association of Ghana (PROMAG)
- Association of Music Rights Owners (AMRO)
- Composers and Authors of Music Association (CAMA)
- Songwriters and Performers Association of Ghana (SPAG)
- Veterans Musicians Association of Ghana (VEMAG)
- Ghanaian Association of Composers, Authors and Publishers (GHASCAP)

Musicians Union of Ghana[7]

The Musicians Union of Ghana (MUSIGA) is the national union of musicians in Ghana incorporated in 1975. MUSIGA has regional offices in all the ten (10) regions of the country.

Its mission is “promoting and preserving Ghanaian culture through education and equipping the Ghanaian musician to be self reliant, creative and industrious”.

MUSIGA is an affiliate member of Ghana TUC and also affiliated with the International Federation of Musicians (FIM). The Union’s membership is made up of Affiliate groups of musicians, singers, engineers, producers, entertainment journalists, music teachers, musical instrument dealers and repairers and various musical groups ranging from choirs, solo artistes, duets, trios, accapella groups, big and small bands and many cultural troupes and ensembles.

Professional Musicians Association of Ghana (PROMAG)

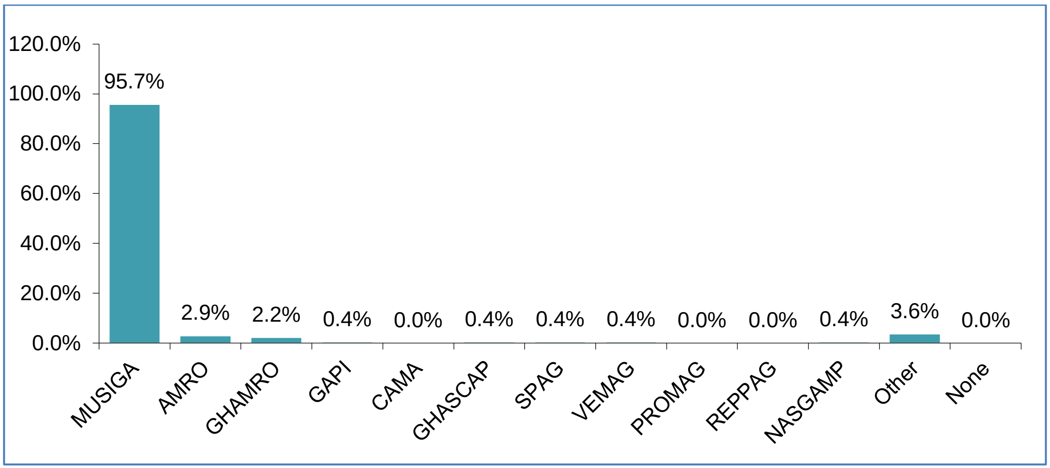
PROMAG has been formed to provide an alternative to the existing musicians' groups on the Ghanaian music landscape. PROMAG is made up of music business savvy accomplished musicians with the requisite knowledge, expertise and experience in various facets of the music industry. PROMAG is about professionalism, productivity & progress, and all musicians who aspire to such laudable ideals and are prepared to upgrade themselves act by adopting the highest levels of professionalism in their music business dealings, are welcome.

Membership of Association

The percentages of musicians who are members of the professional organizations are presented in Figure 5.3.1.

[7] MUSIGA official website

Figure 5.3.1 Percentage of musicians who belong to professional organisations/associations



Source: KPMG Analysis

Not surprising, 95.7% of musicians interviewed are members of MUSIGA as the sample frame used for the analysis was from the Union. Surprisingly, 2.2% of them are members of GHAMRO which is the collection society. 2.9% of musicians belonged to the Association of Music Right Owners and the other associations which constituted 3.6% included the Copyright Owners Association.

5.3.2 Producers Associations

There are three associations of producers and these are listed below:

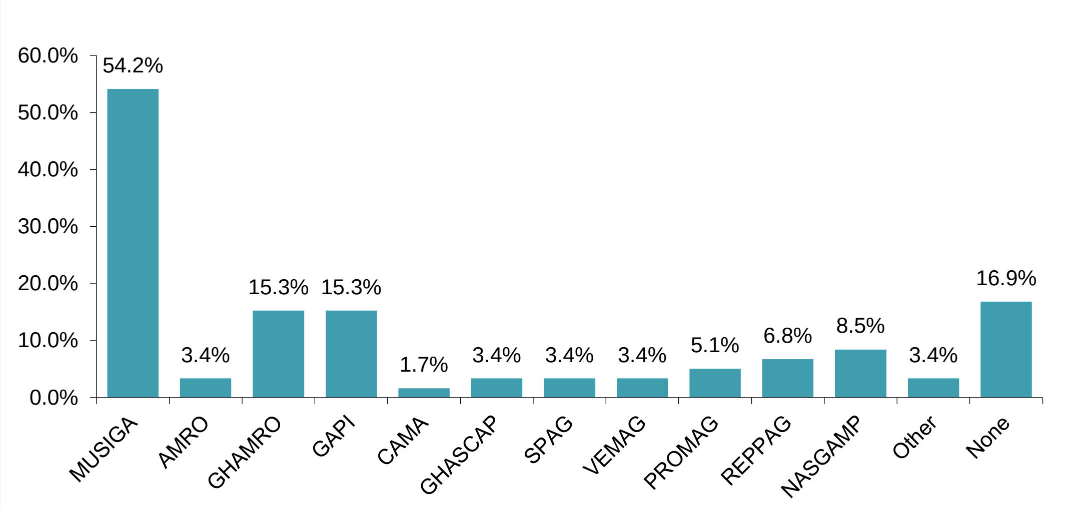
- Ghana Association of Phonographic Industries (GAPI)
- Record Producer and Publishers Association of Ghana (REPPAG)
- National Association of Ghanaian Music Producers (NASGAMP)

Reference to producers also includes those performing the roles of publishers and record labels. The lack of publishing houses and record labels implies that the producers have to perform various functions. GAPI is the prominent of all the associations. It has membership in excess of 150 producers.

Membership

The survey also assessed the membership of producers of the professional organizations. The following chart shows the results. Majority of producers representing 54.2% are members of MUSIGA. GAPI and GHAMRO recorded membership proportion of 15.3% respectively. It was however, surprising that the professional organizations for producers recorded low membership with NASGAMP and REPPAG recording 8.5% and 6.8%. Close to 17% of producers did not belong to any of the professional groups.

Figure 5.3.2 Percentage of producers who belong to professional organisations/associations



Source: KPMG Analysis

5.3.3 Collective Management Organization (CMO)

Ghana currently has three collection societies for music established under the Copyright Act. These are the Ghana Music Rights Organization (GHAMRO), Reprographic Rights Organization of Ghana (Copy Ghana) and the Audiovisial Right Owners Socieity of Ghana.

Ghana Music Right Organization (GHAMRO)[8]

The organization replaced the erstwhile Copyright Society of Ghana (COSGA), which was liquidated due to its financial difficulties. COSGA at the time collected and distributed royalties to all authors in music, literary and film. The collapse of COSGA created the avenue for a new society, the GHAMRO to be formed to manage rights of musicians alone.

GHAMRO is currently the only music related copyright entity in the country. GHAMRO is licensed by law to undertake collective rights management for musical works, sound recordings and performances. It was registered as a private company limited by guarantee under Ghana's Company Code on May 18, 2011, and its Certificate of Approval to operate as a Collective management Organization for Music Rights was signed on December 23, 2011 by Ghana's Attorney-General and Minister of Justice. The certificate was officially handed over to GHAMRO by the Registrar-General of Ghana on January 18, 2012, after which it began operations.

GHAMRO's primary function is to identify and document users of music copyright works, and subsequently license, collect and distribute royalties accruing from such uses on behalf of its members- composers, authors, music publishers, producers and performers.

GHAMRO's mandate is to manage an extensive repertoire of musical works, sound recordings and performances belonging to its members whenever and wherever they are played in a public place both in Ghana, and globally through its affiliate networks via reciprocal agreements or the Berne Convention and other relevant international copyright treaties.

GHAMRO is managed by a board with representatives of all the associations and the union.

Reprographic Rights Organization of Ghana (Copy Ghana)

Copy Ghana is a CMO for reprographic rights in Ghana. Membership comprises Ghana Association of Writers, Ghana Book Publishers Association, Ghana Journalists Association, Ghana Association of Visual Artists and Ghana Union of Professional Photographers. They have the right to charge and collect royalties and other remuneration from the users of works and performances on behalf of its

[8] Official website of GHAMRO

individual members or member associations and distribute such royalties amongst their members. Musicians who publish scores can belong to Copy Ghana.

According to the International Federation of Reproduction Rights Organisations, the total rights holders of Copy Ghana exceed 8,000. Copy Ghana provides licenses to books, journals and newspapers and to polytechniques, private and public universities.

Audiovisial Right Owners Socieity of Ghana

The Audiovisual Rights Owners Society of Ghana was established in 2011 to protect the rights of owners of audiovisual works in Ghana. Rights owners are producers, writers and performers. The nine member board is made up of seven producers and executive producers of film and television and two performers who were duly elected at a conference of practitioners in the Industry.

The society collects royalties on behalf of owners from sources such as royalties from users and fees from taxes on recordable tapes and other material collected and paid by Government.

5.4 Current State of the Sector – Challenges and Opportunities

The sector faces a number of challenges including high up-front costs, limited access to finance, upsurge of piracy, negative effects of the introduction of modern technologies, weak enforcement and supervision of laws and regulations and inadequate export promotion services. The demand for music is heavily 'hit driven' (i.e. highly dependent on whether song will be on popular demand or not). Direct cash flows in relation to performances, time on the airwaves and upsurge in the sale of music products are directly related to whether ones song 'hits' or not. If ones song does not 'hit', then they have to wait painstakingly over time, before they can get into stardom (which does not always happen). The period of wait is filled with few shows to attend if any at all, small charge out rates for performances (the few that they get, mainly because they are not on high demand) and low sales on music products. This is one of the biggest challenges the sector faces. It thus drives many young talents out of the sector and forces the few that remain to churn out low quality products that are unable to cross the borders of the country.

There are a number of developments that are likely to improve the fortunes of the sector. These include the emergence of new digital technologies for recording and distribution that removes/eliminates the physical limitations of CD and cassette sales and introduces ease in the sale, distribution and marketing of music. For example software and applications that support the easy setup of radio stations.

5.5 Porter's Five Forces Model

Porter's Five Forces is a strategic tool used to analyse the competitive nature of an industry.

Table 5.5.1 Porter's Five Forces model

Parameter	Ranking	Comments
Threat of New Entrants	High	The Ghanaian music landscape has changed significantly with some musicians now releasing singles rather than releasing albums which is quite capital intensive. There are so many potential entrants into the various genres and could provide competition. Government policies and product differentiation do not have significant impact on entry into the sector

Parameter	Ranking	Comments
Threat of Substitutes	Very High	There are numerous substitutes to Ghanaian musical works on the market and accounts for the seemingly declining music industry. Consumers have found foreign music attractive and appear to be better substitutes to Ghanaian music. Again, access to other forms of music through imports and downloads from the internet has created a virtual market that provides easy and cheap alternative to the music produced in Ghana. This threat is compounded by the piracy menace as they create substitutes cheaper than the original recording hence pricing the authors out of the market.
Bargaining Power of Buyers	High	Consumers of music products are becoming sophisticated as their tastes and preferences change. The exposure to high quality music from other countries has also raised the expectations of consumers.. Consumers are looking for quality music and not necessarily affordable music. This means consumers have high bargaining powers. This has been compounded by the access to substitutes on the market. Pricing of CDs and cassettes appear to be strongly determined by the market demand hence anything higher than average is unlikely to sell.
Bargaining Power of Suppliers	High	The music sector relies heavily on imported CDs and equipment. This makes production cost high. Few manufacturing companies exist currently and the limited production levels make production cost high. Also the few manufacturers in the market make pricing less competitive. Suppliers of services such as video shoots etc also have high influence on the pricing.
Competitive Rivalry	Very High	Competition in the market is extremely keen with genres competing with each other for space as well as performers within genres also engaged in intense competition. Over the years a number of artistes have gained popularity through their ‘hit’ songs but have quickly faded out with new ‘hits’ from other musicians.

Source: KPMG Analysis

5.6 Conclusion

Several musical genres exist in Ghana and have been influenced over the years by traditions, ethnic groups, geographical locations and the effects of changes in the political terrain among others. These have caused transformations (some drastic) in some genres over the years, with some genres developing several subgenres. Changes in political leaderships and in government policies have had their own impact on the transformation of music in Ghana, particularly highlife music. Highlife music has been transformed from traditional percussive beats fused with palm wine guitar-style rhythms through dance and guitar band varieties to burger highlife (a subgenre of highlife). Musical varieties such as Hiplife and its variants (Azonto, Al-kaida, Twi pop etc) and the Gospel musical genres all have their roots embedded in the highlife music. They can all be traced to the effects and consequences of transformations in Ghana’s political leadership and the adaptations of the musicians to survive in the industry.

Some government ministries have oversight over the music sector where as others only have a working relationship with the sector. Ministries that have oversight includes the Ministry of Tourism, Culture and Creative Arts, the Ministry of Trade and Industry and the Ministry of Justice & Attorney General's Department.

Prominent among the organisations formed within the music sector is the Musicians Union of Ghana (MUSIGA). It is the national union of musicians in Ghana and is a member of the Trade Union Congress (TUC). Ghana Music Rights Organization (GHAMRO) on the other hand is the sole Ghanaian copyright entity licensed by law to undertake collective rights management for musical works, sound recordings and performances. The sector is faced with a lot of challenges including high up-front costs, limited access to finance and upsurge of piracy.

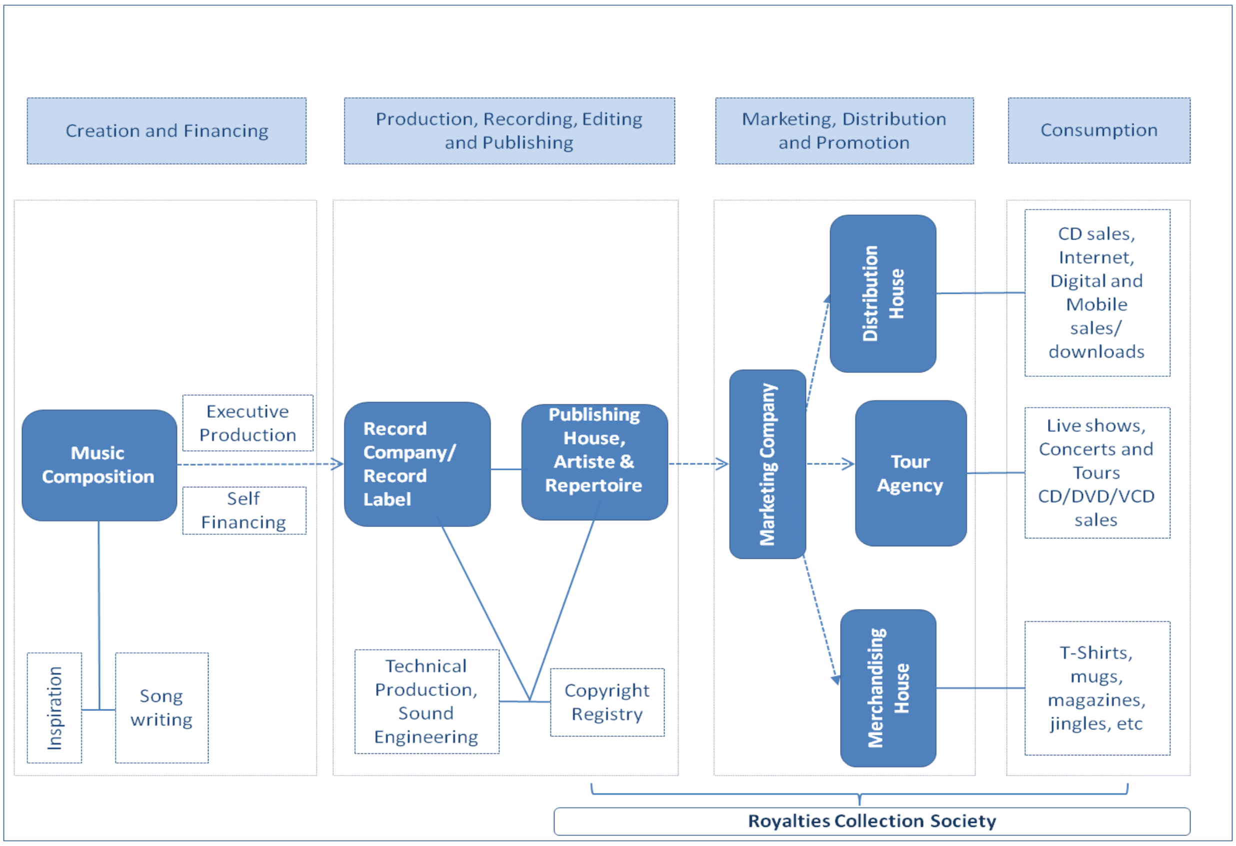
6 Market Characteristics

6.1 Overview of Music Value Chain

6.1.1 Typical Music Value Chain around the World

Musical content traditionally flows through the value chain from the stage of music creation to that of music consumption. The diagram below attempts to describe a typical music value chain. Even though it appears to be segmented, the practical situation is such that, most of the stages intertwine.

Figure 6.1.1 Typical music value chain around the world



Source: KPMG Analysis and research

The crux of the music value chain is musical content composition. A songwriter/composer may first be inspired by God, past experiences, current events, passion or any others to compose a song. Composition may entail the melody creation and sometimes the addition of lyrics.

The rights in the song may be copyrighted and owned either by music publishers or the song writer/composer themselves. The objective of a music publisher is primarily to exploit the song. Publishing houses sometimes have a unit, Artiste and Repertoire, with the primary objective of managing the artiste or the talent in the artiste.

The key participants involved in the collection of royalties are the music authors/composers, publishers, end users of music and royalties collection societies. Collection societies may either be member-owned collection societies, quasi-governmental collection societies and privately-owned collection agencies.

Once an author/composer has licensed his works to a publisher, the publisher collects two separate rights embodied in the work on behalf of the author/composer (and himself); mechanical rights and performance rights.

The mechanical rate, which is due on the sales of a sound carrier containing the work, is set either by:

- Collective bargaining – as in South Africa, where it is 6.75% of PPD (published price to the dealer)
- By negotiations between the international record industry association IFPI and international mechanical rights societies association BIEM – as in Europe, where it is 9.0009% of PPD
- By negotiations between the major record companies and major publisher – as in South East Asia, where there is a Memorandum of Understanding (MOU) between the two which has agreed a rate of 5.4% of PPD
- By statute – as in the US where the rate is 6.95 cents per record and 1.3 cents per additional minute

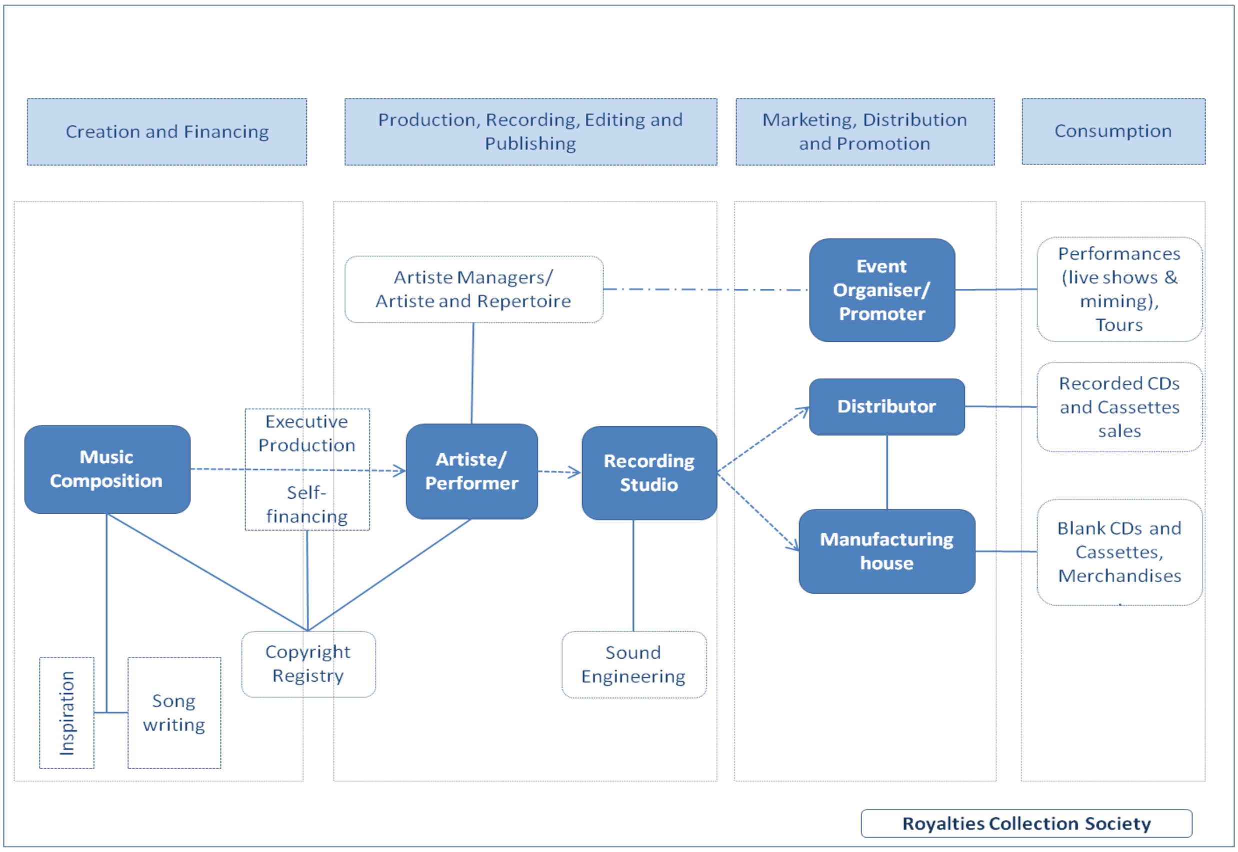
As can be seen from the above the collection of mechanical royalties is far easier and much cheaper to collect than performance royalties. Sources of mechanical royalties include the record company that produces the sound carrier. There is also broadcast mechanical right which is due on the dubbing of records by broadcasters and on the playing of records in public, at a disco, in hotels, etc. This is also referred to in certain circles as the synchronization rights. Publishing companies are often owned by record companies and thus there are few problems relating to the identification of the works. Publishers collect synchronisation fees/rights themselves when music is synchronized to a video, be it a musical video, a movie, television show or a commercial. These are generally paid direct by the users for the use of their copyrights. Major global recording labels since 2012 include Universal Music Group, Sony Music Entertainment and Warner Music Group (EMI Group Limited has been absorbed by the three record labels mentioned above and as such EMI does not exist any longer).

The collection societies (which evolved around the performance right) only became involved with mechanical rights later. This was generally for reasons of administrative ease and to give greater leverage to copyright holders through the representation of their rights by a single body.

6.1.2 Music Value Chain in Ghana

In Ghana, individuals usually perform multiple roles within the music value chain which often cuts across the various stages. An individual could perform all the roles in the entire value chain or most of it. Figure 6.1.2 attempts to describe the music value chain that exists in Ghana.

Figure 6.1.2 Music value chain in Ghana

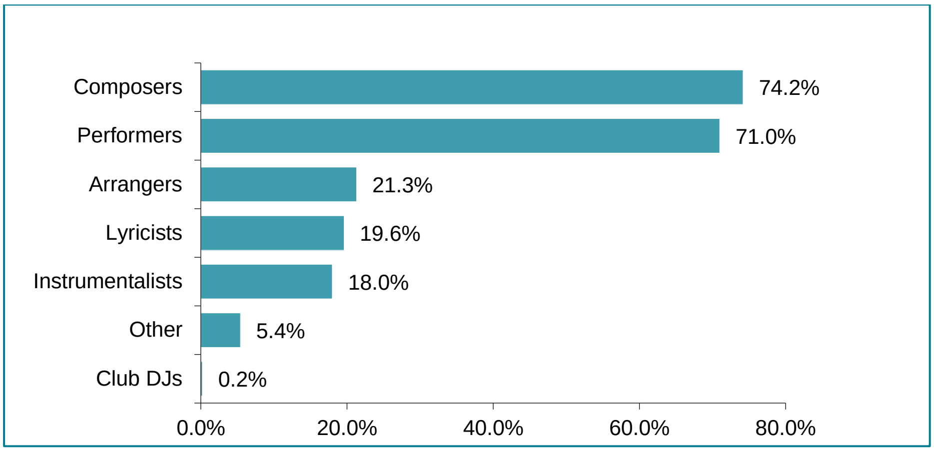


Source: KPMG Analysis

Musical Content Creation

From the study, it was observed that musical content creators in Ghana are made up of composers, lyricists, arrangers, performers/singers, instrumentalists and club DJs. Composers and performers/singers make up 74.2% and 71.0% respectively. This implies that a greater proportion of musical content creators in Ghana are composers, followed by performers. What is worth noting is that, a composer does not necessarily have to be a performer/singer. Arrangers and lyricists constitute 21.3% and 19.6% respectively. Thus, close to a fifth of the sample are capable of arranging written songs and writing their own songs. Figure 6.1.3 describes the various categories of music content creators according to their representations.

Figure 6.1.3 Music content creators - categories



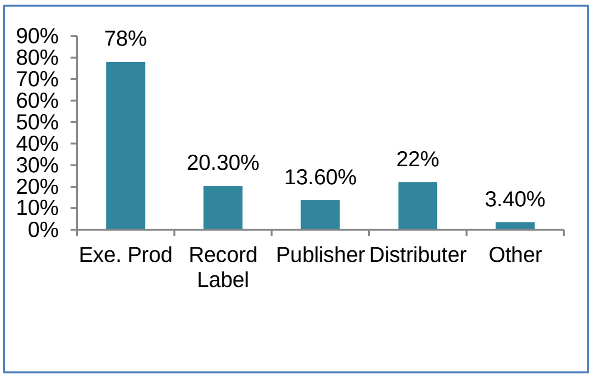
Source: KPMG Analysis

Musical Content Financing

Reference to an Executive Producer in the Ghanaian music industry is limited primarily to the financiers or the financial sponsors of music recordings and other operations. The membership of GAPI, the most prominent producers association in Ghana is in excess of 150.

The survey sampled 60 producers and out of that sample 79.7% were executive producers, 20.3% out of that sample were record labels and 13.6% were publishers. Some producers also double as distributors, 22% of the producers doubled as distributors. This can be seen in Figure 6.1.4.

Figure 6.1.4 Categories of music content financiers



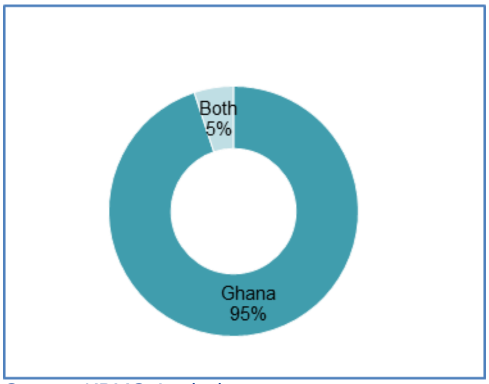
Source: KPMG Analysis

- *Regional Distribution*

Asked whether they operate from Ghana and or abroad, 95% answered they operate solely in Ghana with 5% responding that they operate from both Ghana and abroad. Reasons for operating from abroad include the existence of modern technology for music production.

Majority of producers (59.3%) whom we interviewed operate from the Greater Accra Region. This is followed closely by the Ashanti Region with 45.8%. This also corroborates the finding for the musicians which depicted a similar pattern.

Figure 6.1.5 Regional distribution of Producers

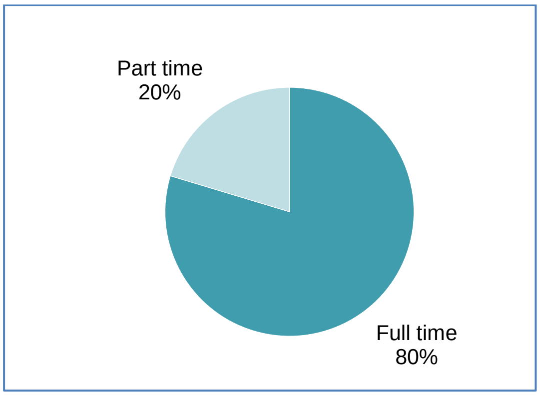


Source: KPMG Analysis

- *Professional status*

We observed that, 80% of those interviewed were involved in the business for full time purposes, thus, they are not involved in other businesses whiles the rest of the 20% were in it for part time basis, and thus they are into other businesses.

Figure 6.1.6 Professional status of producers



Source: KPMG Analysis

The greater percentages of musicians (77.2%) finance their operations all by themselves.

Copyright, Publishing, Artiste and Repertoire

Copyright[9]

For almost a century, copyright protection in Ghana had developed steadily from a schedule in a Ministry to two fully fledged independent offices. The history of Copyright protection started in 1911 with the U.K. Copyright Act of 1911 which was one of the statutes that was of general application to the British Colonies. Issues of copyright had been the responsibility of the Ministry responsible for information. Ministerial responsibility for Copyright Matters changed to the National Commission on Culture when the National Commission on Culture Law 1990, PNDC Law 238 placed the Copyright Office under the National Commission on Culture. In 2005, ministerial responsibility for copyright and related matters shifted to the Ministry of Justice.

The rights in the song may be copyrighted and owned either by music publishers or the song writer/composer themselves. There is a copyright law in Ghana which seeks to protect authors of music, art, audiovisual and computer software. It accords moral and economic rights. Moral right

[9] Official website of the copyright office and interviews with copyright officials

accords authors the right to be named as the owners of the art where as economic right accords the author the right to be remunerated from their creation. Registration of authored works with the Copyright Office in Ghana is not mandatory.

Challenges with the current copyright law include difficulties in enforcements of the laws. Right owners do not appear in court to testify, this lack of cooperation on behalf of right owners challenges effective enforcement of the law.

Publishing

Individuals within the music value chain perform certain publishing functions by themselves as part of their functions.

Some executive producers include the roles of publishing in their operations. 13.6% of executive producers provide some form of publishing services to their clients. There are two publishers associations in the industry, the Record Producer and Publishers Association of Ghana (REPPAG) and the Ghanaian Association of Composers, Authors and Publishers (GHASCAP). Memberships of executive producers in these associations are on the low side. There are 6.8% of executive producers who belong to REPPAG and 3.4% who belong to GHASCAP.

Some musicians also perform the roles of publishing themselves. The survey shows that, 70.6% out of 392 musicians who responded to that question perform the roles of publishing on their own. This higher percentage could indicate the industry's need for the establishment of official publishing houses and the formal provision of such services on the behalf of right owners. For membership with associations, only 0.04% of musicians belong to GHASCAP and no musician belongs to REPPAG.

Artiste and Repertoire

Managers of artistes in Ghana are mostly referred to as Artiste Managers. Few record labels exist in Ghana and out of these few some have units called Artiste and Repertoire who perform the functions of managing the Artiste as a brand, product or talent. They are supposed to liaise with all other stakeholders of the artiste. These functions lead to different kinds of names for the Artiste Manager including Talent Manager.

Recording, Production and Manufacturing

Recording

There are no internationaly recognised record companies in Ghana as most of those who operated in the country folded up due to weaknesses of the copyright system. Production of musical content in Ghana involves the recording of the musical content, mainly by Studio Engineers who edits (or as is popularly used in the industry, 'mixes') the recording to provide a master copy for duplication by manufacturing houses. The Hiplife and other contemporary genres have Studio Operators or Sound Engineers programming the musical melody digitally. It may include both the vocals and the instrumentations. However, this function in some foreign markets is restricted to a Technical Producer (Otoo, 2006).

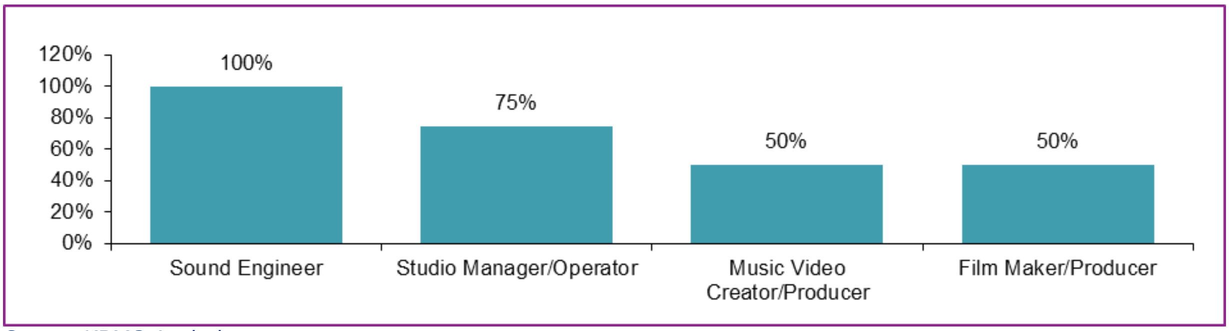
A common practise in the industry is for an artiste to initially prepare a demo version of the song to a Studio Engineer with the objective of providing him/her with a fair view of the artistes' needs. Some studios provide their artistes with variants of the final copies of the recordings. Some include a mix made up of the lead vocalist, the instrumentation and the chorus, another may contain only the instrumentation and the chorus but without the lead vocals. Yet another variant can contain only the instrumentation, with the whole idea of providing the artiste enough time to improvise whilst on stage and be creative during performances and rehearsals (Otoo, 2006).

- *Professional Categories*

The category of our research that catered for Studio Managers and Sound Engineers also considered Music Video Creators and Film Makers/Producers. Professionals in this category mostly have multiple roles (i.e. they can belong to more than one category). It was observed from the results that, all (100%) respondents in this category were Ghanaian men who operate as full time Sound Engineers. 75% of them operate as Studio

Managers/Operators and 50% of as Music Video Creators and the same percentage as Film Makers/Producers as indicated in Figure 6.1.7.

Figure 6.1.7 Professional categories for recording studio professionals

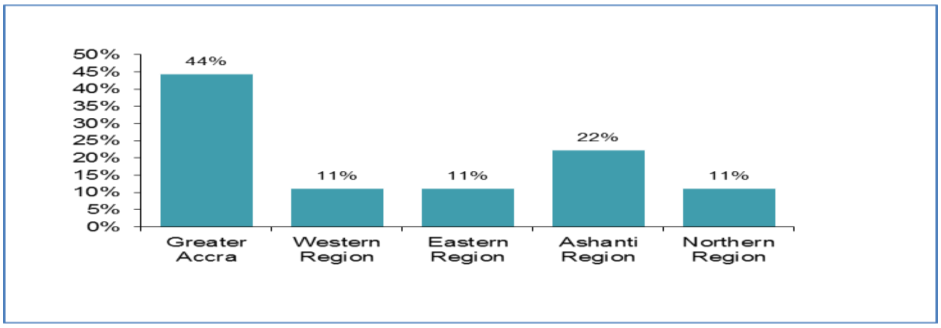


Source: KPMG Analysis

- *Geographical Location*

Studio Managers are distributed over five of the regions. Greater Accra region has the highest number of 44% followed by the Ashanti region of 22%. The other three regions have 11% each of studio operators.

Figure 6.1.8 Geographical location of recording studio professionals

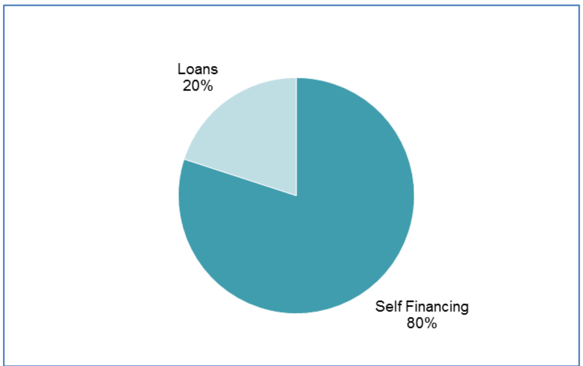


Source: KPMG Analysis

- *Financing*

Most studio operators self finance their operations. 80% of the studio operators interviewed finance their own operations and the remaining 20% use loans.

Figure 6.1.9 Financing details



Source: KPMG Analysis

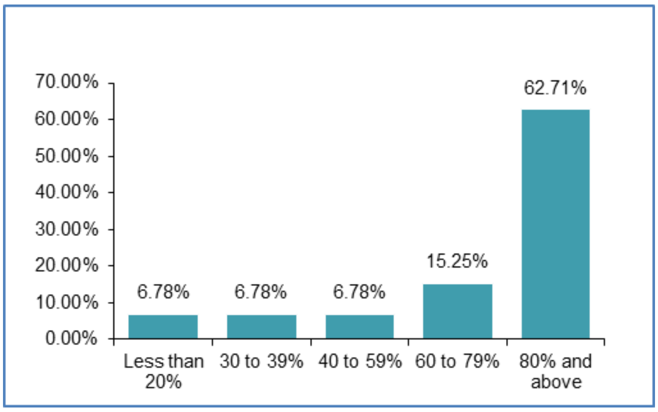
Production

Production in Ghana refers mainly to the function of financing the creation of musical content. It may in some contexts also refer to the operations of a record label or a publisher. All producers (100%) in Ghana produce CD albums, where as 35.6% produce cassettes albums. We observed that, 39% of producers have other sources of income where as 61% of them do not. Those with other sources of income were framers, estate developers, music teachers, dealers in mobile phones and other tradesmen.

- *Composition of Music Production*

Out of the sample, 62.7% responded that Ghanaian music constitutes more than 80% of their production. About 20% of producers responded that Ghanaian music constitute less than 60% of their production.

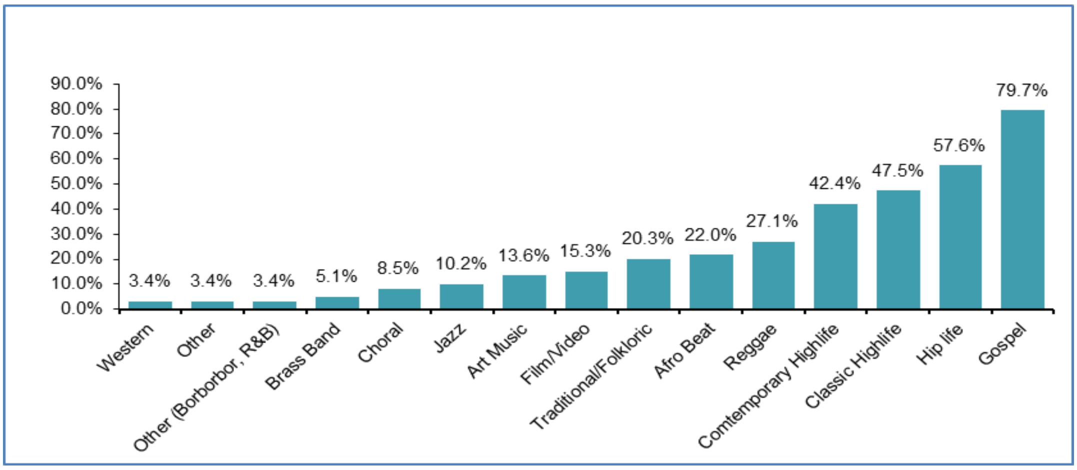
Figure 6.1.80 Percentage of music production that is Ghanaian



Source: KPMG Analysis

- *Type of Genre*

Figure 6.1.11 Percentage of production according to musical genres



Source: KPMG Analysis

Gospel genre remains the most produced of all the types of genres in Ghana with 79.7% of producers responding they produce gospel. This supports the notion that gospel is the most popular genre in the country. This trend has been explained by the role churches play in training musicians. Hip-life is the second most produced genre with 57.6% followed by classic highlife with 47.5%.

- *Volume of sales*

The volume of sales according to the regional divide is indicated in the Table 6.1.1.

Table 6.1.1 Volume of sales

Highest level of sales		
Region	**Frequency**	**Percent (%)**
Greater Accra	24	40.7
Ashanti	22	37.3
Volta	5	8.5
Eastern	4	6.8
Central	2	3.4
Upper East	2	3.4
Total	**59**	**100**

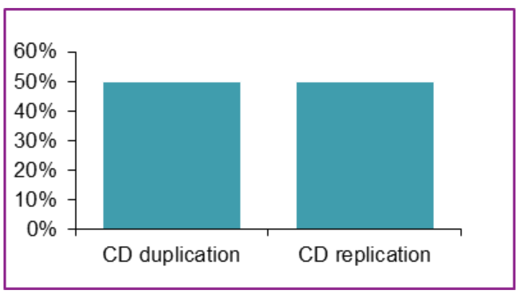
Source: KPMG Analysis

The Greater Accra and the Ashanti regions account for the largest proportions of regional musical content sales, recording 40.7% and 37.3% respectively. Sales for the remaining regions are each below 7%. The proportion of producers that produce Ghanaian musical content above 80% of their yearly production is 62.7%.

Manufacturers

Manufacturing involves the physical creation of the CD/cassette products (blank and/or recorded) and the artwork. Through meetings and interviews with manufacturers in Ghana, we gathered that there are approximately nine functioning manufacturing houses in Ghana. Out of this number four were sampled for interviews during our research. We observed that, 25% of these manufacturing houses actually manufacture blank CDs and the remaining 75% purchase already manufactured CDs and use that in the duplication and/or replication of CDs[10]. All (100%) manufacturing houses in Ghana duplicate CDs but only half (i.e. 50%) of them replicate CDs. There is a 100% representation of manufacturing houses in the Greater Accra region, 75% of them have their presence in the Ashanti region. The term duplication of CDs is understood to mean making copies of a 'master' CD in a limited quantity. Replication of CDs on the other hand is understood to mean the mass production of CDs.

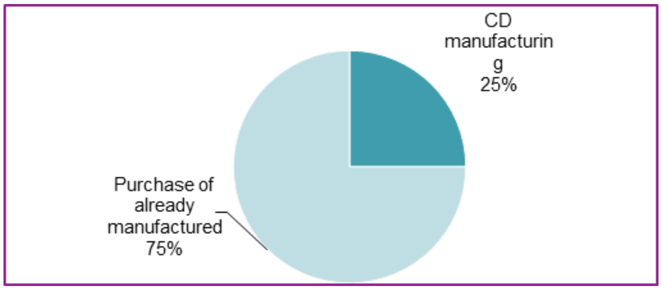
Figure 6.1.12 Services provided by the manufacturers



Source: KPMG Analysis

[10] Replication involves mass production where as duplication involves making fewer copies of CDs, DVDs etc

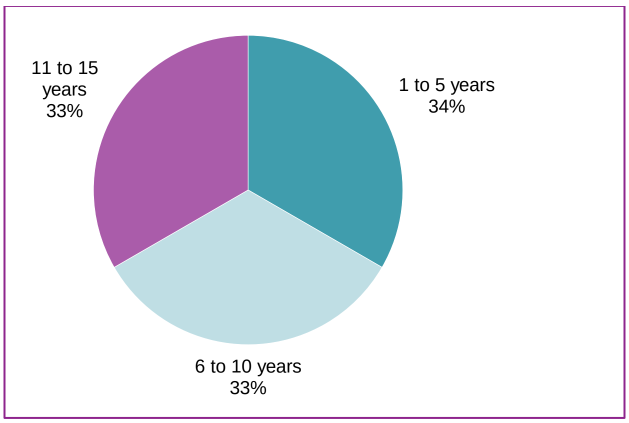
Figure 6.1.9 Percentage who manufacture/purchase CDs



Source: KPMG Analysis

We also observed that 34% of them have been in operation for the less than 5 years. 33% of them have been in operation between 6 and 10 years and same percentage have been in operation between 11 and 15 years. This is indicated in the chart below. Individual manufacturing houses admit to the fact that, due to the increase in competition, their market shares have declined. Some also acclaim the decline in their market shares to the influx of the digital download platforms, whose negative effects have led to the upsurge of pirate operations.

Figure 6.1.14 Duration of being in business



Source: KPMG Analysis

Some identify the unstable nature of the electricity in Ghana as a challenge in the industry. They also state the lack of technical assistance as one of the main challenges they face in the industry. For example there are no local repairers/technicians of the machines they use in their operations. As such, costs for hiring expatriate technicians reduce their profit margins. A few also admit to difficulty in the payment of fees by their clients.

Marketing and Distribution

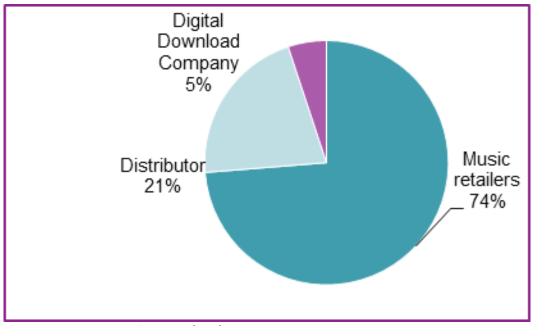
Distributors and Retailers

Analysis of music distribution patterns in Ghana was studied under this section. Physical music/sound carriers are distributed by three main categories of distribution agents. One hundred and two (102) respondents were sampled for interviews and questionnaire administration.

- *Professional categories*

These respondents were categorised into distributors, music product retailers and digital download companies, who work either as formal establishments or as informal entities. Their percentage composition within the total sample size of 102 is presented in the chart below. It can be seen from the chart that most of the respondents are music retailers (74%). 21% of them are distributors and 5% of them are digital download companies.

Figure 6.1.15 Professional categories of Distributors and Retailers

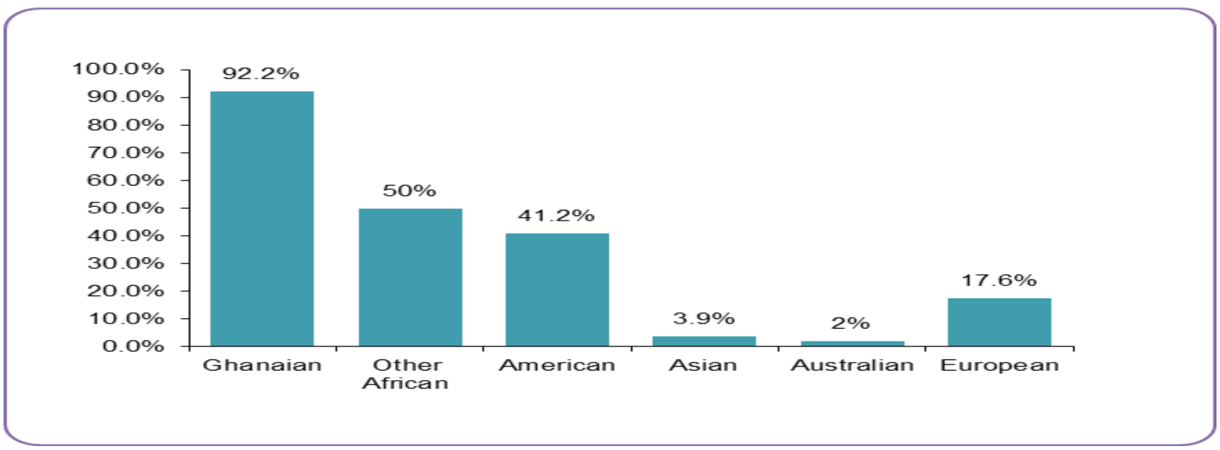


Source: KPMG Analysis

- *Kinds of music being distributed*

The type of music distributed include Ghanaian, other African, American, Asian, Australian and European music. Out of the total number of distributors we interviewed, 92.2% of them distribute Ghanaian music. 50% distribute other African music, 41.2% distribute American music followed by 17.6% of them that distribute European music. Asian and Australian music is distributed by a smaller proportion of distributors constituting 3.9% and 2% respectively.

Figure 6.1.16 Kinds of music being distributed



Source: KPMG Analysis

Media and Telecommunication Companies

Music is also distributed in the form of airplays on media networks such as the radio and television stations. They are also distributed in the forms of ringtones and caller tunes by the telecommunication companies. The results and findings of our analysis of data from this category are presented with charts below.

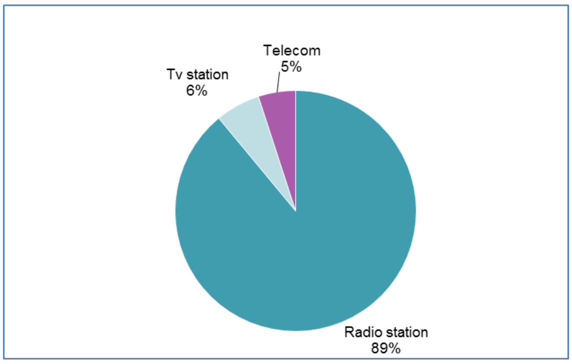
On the average, the telecom companies sampled have a total subscriber base of 17,266,667 out of which 30% subscribe to music downloads, 72% subscribe to caller tunes and 17% subscribe to ringtones.

In a year the average number of downloads of music is 39,250, caller tunes is 38,067 and ringtones, 500. We observed that, 66% out of all downloads were Ghanaian music. There was a survey also on media and telecom to assess their contributions to the development of the music industry.

- *Professional Category*

Radio stations dominate the media and telecom companies. From the study 89% of interviewees are in the radio stations. The remaining 11% belong to TV stations and telecom companies.

Figure 6.1.10 Professional categories of media and telecom companies



Source: KPMG Analysis

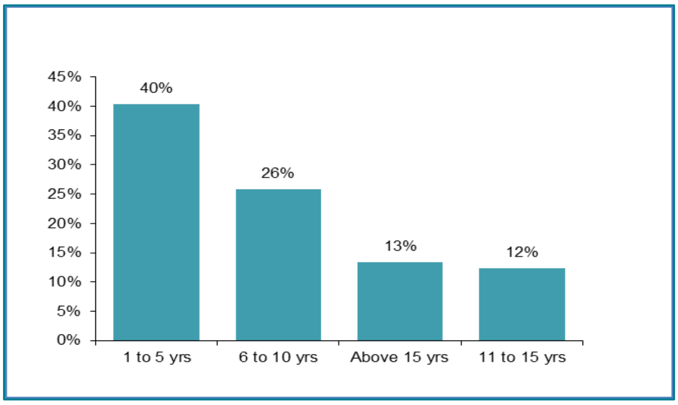
- *Years of Operation*

The study sought to examine how long media and telecom companies have been in operation and it was observed that a greater percentage, 66%, of TV stations sampled have been in operation for more than 10 years and only 25% of radio stations have been operating for more than 10 years. For the telecom companies sampled, none have been in operation for more than 10 years and for all the three categories none has been operating for less than a year. The charts that contain these analyses have been presented below.

✓ *Radio Stations*

Most of the radio stations interviewed have not been in the profession for long. 40% have been operating for only 1 to 5 years whiles 26% have been in the business for 6 to 10 years. The study also showed that 12% have been operating for 11 to 15 years and the remaining 13% for less than a year.

Figure 6.1.11 Duration of being in business – radio stations

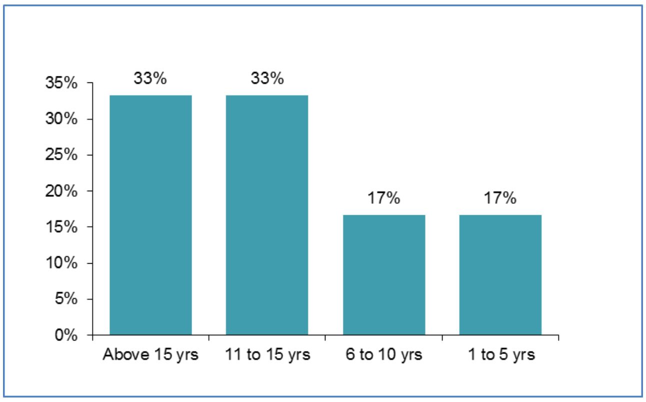


Source: KPMG Analysis

✓ *TV stations*

Most of the TV stations have been operating for long. 33% have been operating for more than 15 years and 33% for 11 to 15 years. Also 17% each have been operating for 6 to 10 years and 1 to 5 years.

Figure 6.1.12 Duration of being in business - TV stations

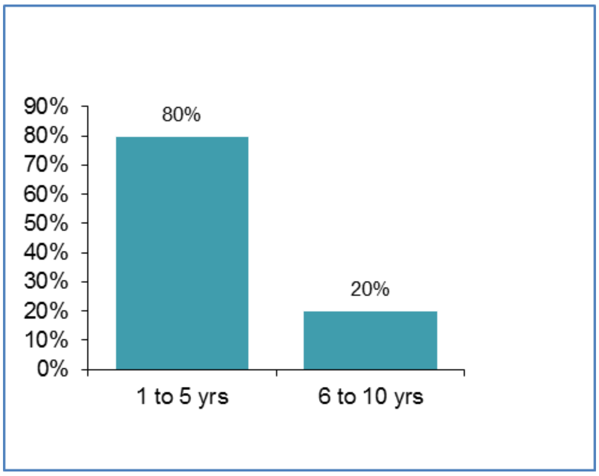


Source: KPMG Analysis

✓ *Telecom Companies*

From the sample, about 80% have been operating for 1 to 5 years and about 20% for 6 to 10 years. Thus most of the telecom companies interviewed have not been in operation for long. A few had operated for more than 10 years.[11]

Figure 6.1.13 Duration of being in business - Telecom companies



Source: KPMG Analysis

Coverage by Regions

For radio stations sampled greater percentage have coverage in the Ashanti region. More of the TV stations have coverage in the Central region.

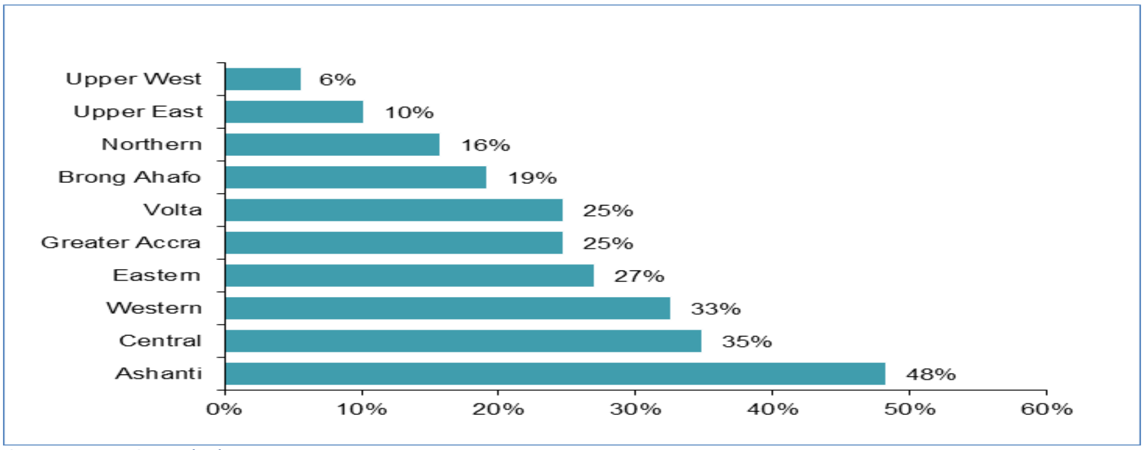
✓ *Radio Stations*

The Ashanti Region has 48% of radio stations with coverage followed by the Central region which has 35%. 33% of radio stations have coverage in the Western region, 27% in the Eastern region and 25% each in the Greater Accra and Volta regions. Brong Ahafo region recorded 19% of radio stations and the Northern region 16%.

The Upper East and Upper West regions have the lowest number of radio station coverage of 10% and 6% respectively.

[11] Percentages have been approximated

Figure 6.1.14 Regions that frequency of radio stations reach

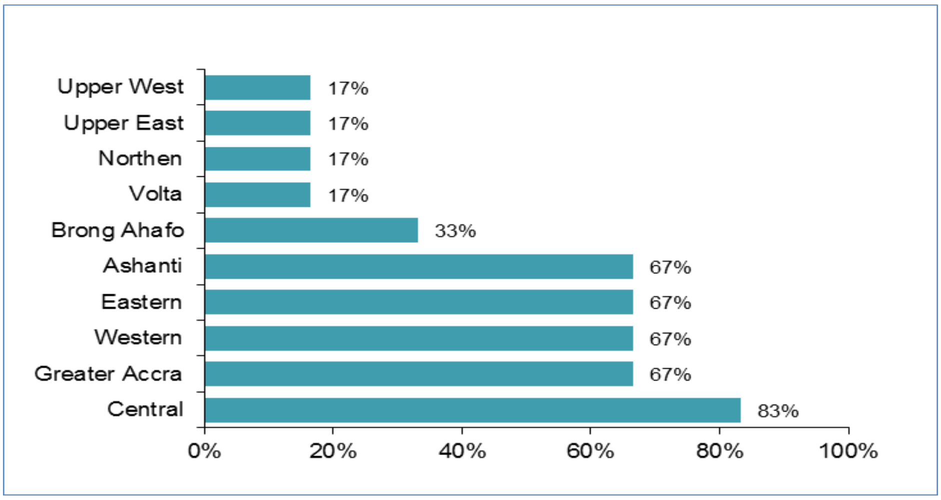


Source: KPMG Analysis

✓ *TV Stations*

From the study, 83% of TV stations interviewed have coverage in the Central region, thus the Central region recorded the highest percentage of TV stations. The Greater Accra, Western, Eastern and Ashanti regions recorded 67% each and the Brong Ahafo 33%. The lowest percentages of 17% each were recorded for the Volta, Northern, Upper East and Upper West.

Figure 6.1.15 Regions that frequency of TV stations reach



Source: KPMG Analysis

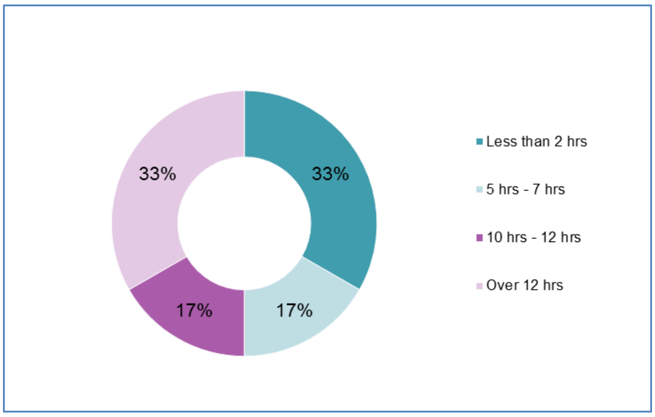
- *Radio Stations Airtime for Music*

The activities of the radio stations are mostly characterized by music. 48% of interviewees from the radio stations assign over 12 hours of airtime to playing music, 18% assign 10 to 12 hours, 24% assign 5 to 10 hours and 9% assign 2 to 5 hours of airtime to music.
Out of the total interviewees from radio stations only 1% assign less than 2 hours of airtime to the playing of music. This explains why a greater percentage of consumers use the radio as a medium for listening to music.

- *TV Stations Airtime for music*

Compared to the radio stations, TV stations do not devote much time to music. 33% assign less than 2 hours of airtime to music, 17% assign 5 to 7 hours and 10 to 12 hours each. 33% also assign over 12 hours of airtime to music.

Figure 6.1.16 Amount of airtime dedicated to music by TV stations

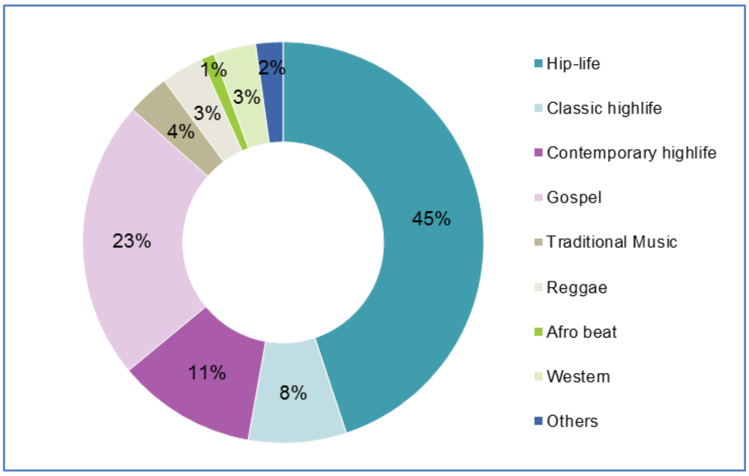


Source: KPMG Analysis

- *Genres Preferred by Listeners*

Hip-life is the most preferred genre by listeners for both radio and TV stations and it makes up 45% and 100% respectively of responses from these categories. For the radio stations gospel is the next preferred genre which is 23% of interviewees from the radio stations. Contemporary and classical highlife makes up 19%. Traditional, reggae, western and afro beat, 4%, 3%, 3% and 1% respectively, are the least preferred genres by listeners. Figure 6.1.29 shows the analysis from the radio stations.

Figure 6.1.17 Genres preferred by Listeners

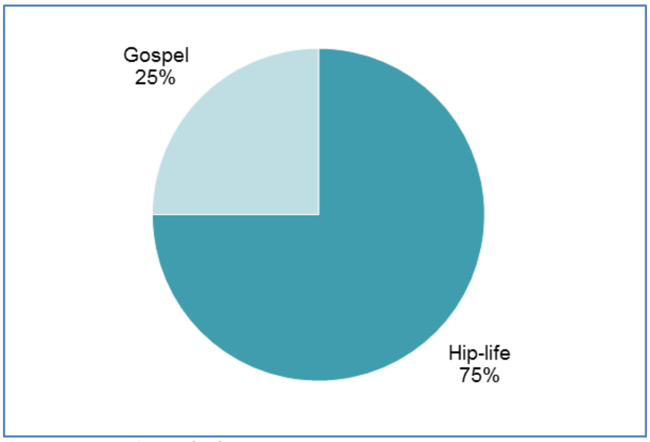


Source: KPMG Analysis

- *Genres mostly utilized by telecom companies*

From the study two genres are the mostly utilized by telecom companies and these are Hiplife and gospel music. 75% of telecom companies utilize Hiplife and 25% gospel music.

Figure 6.1.18 Genres mostly utilized by telecom companies

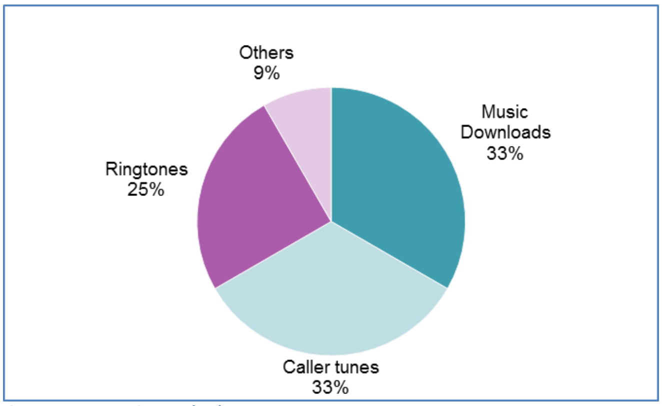


Source: KPMG Analysis

- *Value added services by telecom companies*

The main service lines examined were music downloads, caller tunes and ringtones. Music downloads and caller tunes are provided by 33% each of the telecom companies sampled. 25% provide ringtone services and the remaining 9% provide other services.

Figure 6.1.19 Value added services



Source: KPMG Analysis

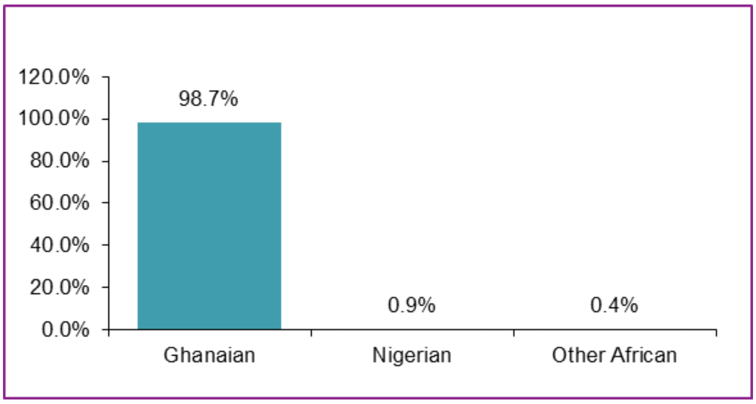
Consumption patterns

Consumer preference and consumption patterns in relation to the patronage of Ghanaian music were studied during this research. Our research considered two hundred and thirty (230) consumers. The results and findings of our analyses are presented with charts below.

- *Place of origin*

From our analysis we observed that 98.7% of respondents were Ghanaian, 0.9% was Nigerian and 0.4% was from other African countries.

Figure 6.1.20 Country of origin according to consumers

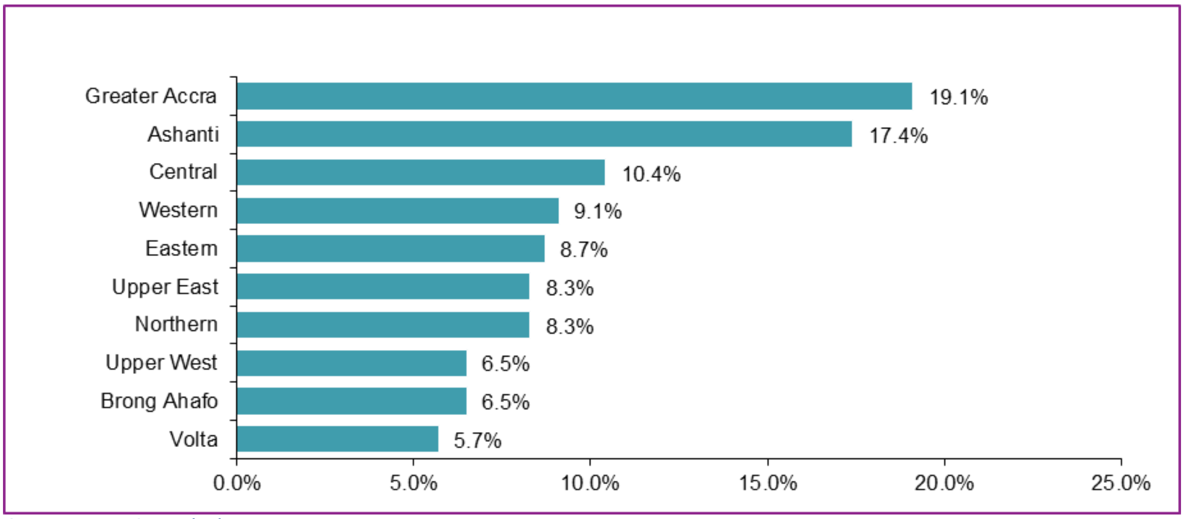


Source: KPMG Analysis

- *Regional distribution*

Most of our consumer respondents were based in the Greater Accra Region (19.1%). This was followed by the Ashanti Region (17.4%) and then the Central Region represented 10.4%. Each of the remaining regions had a representation below 10% but above 5%.

Figure 6.1.21 Regional distribution - Consumers

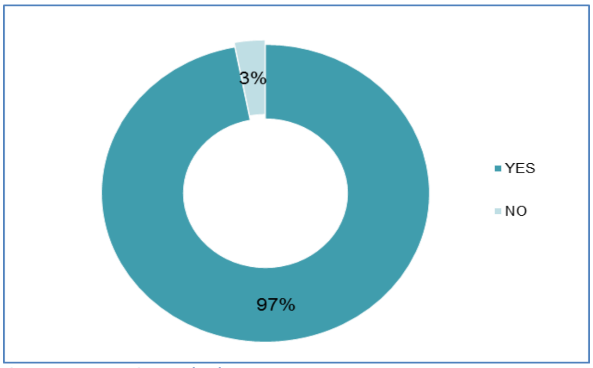


Source: KPMG Analysis

- *Ghanaian Music Preference*

The study showed that 97% of consumers like Ghanaian music whereas only 3% of consumers interviewed did not like it.

Figure 6.1.22 Percentage of consumers who prefer Ghanaian music

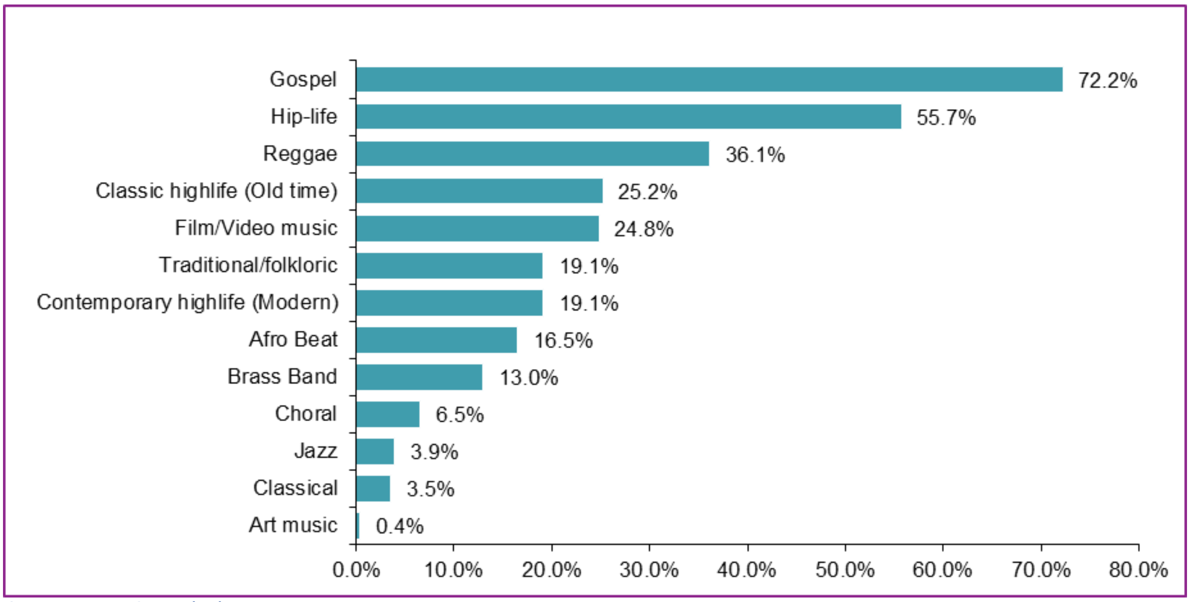


Source: KPMG Analysis

- *Genres*

Most of them (72.2%) preferred Gospel music. The next most preferred genre is Hiplife which makes up 55.7% of the total preferred genres. Classical and Art music are the least preferred genres representing 3.5% and 0.4% respectively. The chart below presents the detail.

Figure 6.1.23 Consumer preference of musical genres

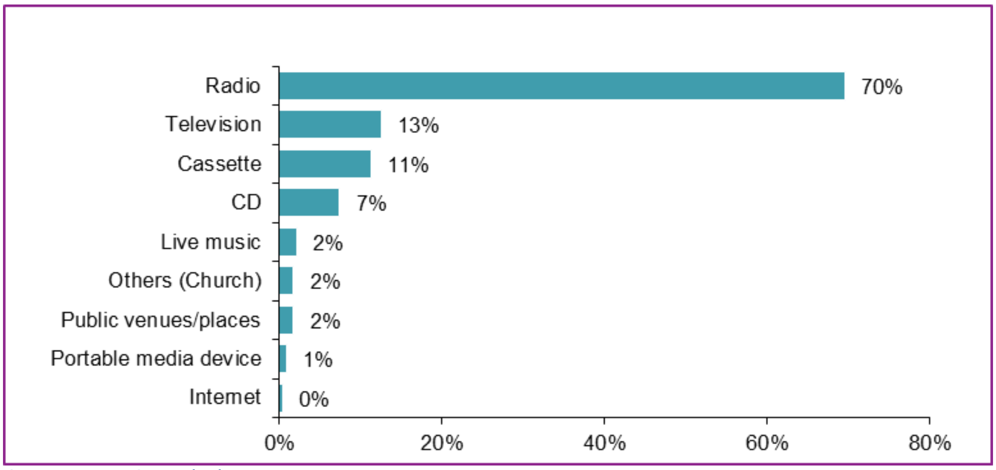


Source: KPMG Analysis

- *First exposure to Ghanaian music*

Most of the consumers were first exposed to Ghanaian music through the radio (70%). This is factual as there were not many television stations 20 to 26 years ago. The next highest means by which most respondents were exposed to Ghanaian music was through the television (13%). Absolutely no one was first exposed to Ghanaian music from the use of the internet. This is also not surprising as the use of the internet was drastically low 20-26 years ago.

Figure 6.1.24 Consumers' first exposure to Ghanaian music

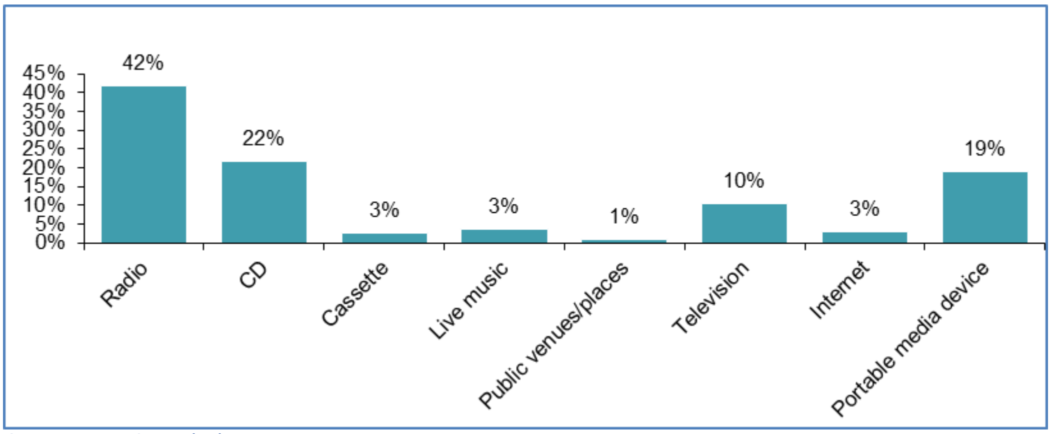


Source: KPMG Analysis

- *Preferred Medium*

We observed that, 42% of consumers use the radio as a medium for listening to music followed by CDs which makes up 22%. Only 1% of consumers interviewed prefer to listen to music in public places. Live music and internet are not preferred much.

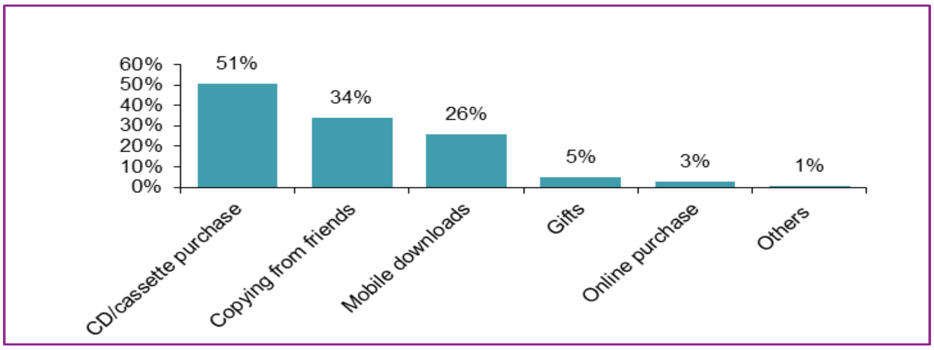
Figure 6.1.25 Preferred medium of listening to music



Source: KPMG Analysis

- *Music acquisition*

Figure 6.1.26 Means of acquiring music



Source: KPMG Analysis

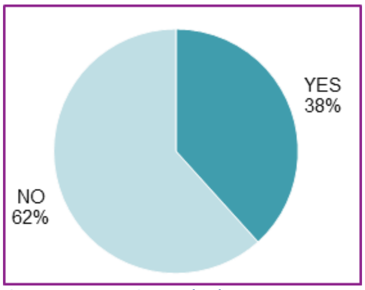
Out of the population of music consumers, 51% acquire music through the purchase of CDs/cassettes. This is followed by 34% of them who copy from friends. 26% acquire music through mobile downloads.

- *Live shows*

We observed that, most of the consumers do not attend live shows. 142 respondents out of 230, representing 62% of them do not attend live shows. Their main reasons for not attending live shows as stated by the respondents included the fact that live show tickets are too expensive. They also state that, shows and venues are not attractive and artistes do not give value for money. Others stated that they are always busy and do not like going out.

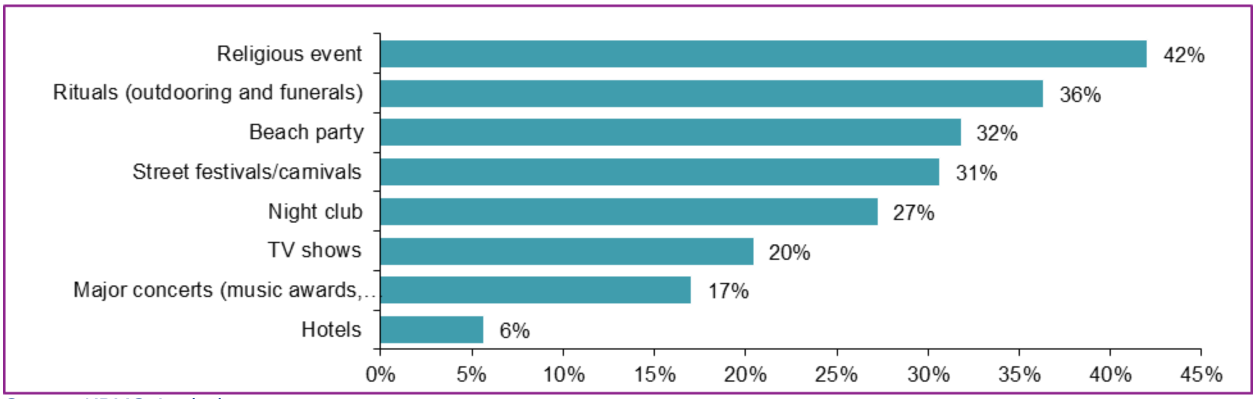
Only 88 respondents representing 38% indicated that they attend live shows. Out of these, 42% of them prefer to attend religious events, 36% of them prefer to attend rituals in the forms of 'outdoorings' and funerals, 32% prefer to attend beach parties and 31% prefer to attend street festivals/carnivals. Those who prefer night clubs form a total of 27%, followed by those who prefer TV shows, that is 20%. Major concerts (music awards, night of a laughs etc) and events at hotels form the least percentages of 17% and 6% respectively. These figures are presented in the charts below:

Figure 6.1.27 Percentage of consumers who attend live shows



Source: KPMG Analysis

Figure 6.1.28 Consumer preference of types of live shows

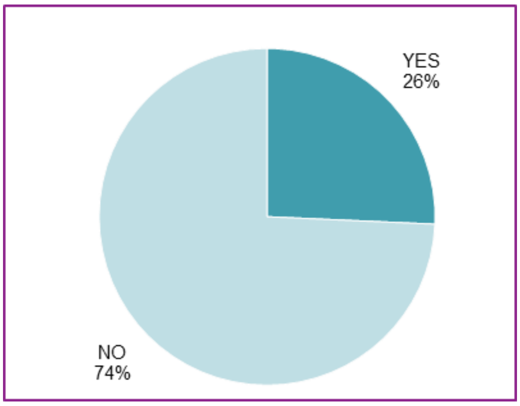


Source: KPMG Analysis

- *Music education*

Most of consumers are not pursuing any form of music education, either formal or informal. We observed that, 74% of respondents are not pursuing any form of music education as opposed to 26%.

Figure 6.1.29 Percentage who are pursuing music education

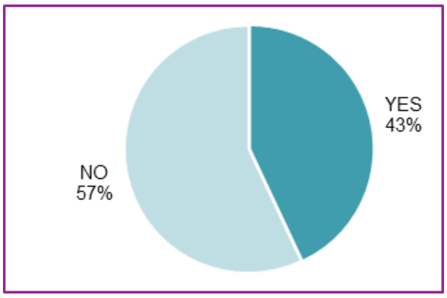


Source: KPMG Analysis

- *Musical instrument purchase*

We observed that about 57% of the respondents did not own any musical instrument. They also do not intend to purchase one. The remaining 43% however have intentions of purchasing a musical instrument at one point in their lives.

Figure 6.1.30 Musical instrument purchase



Source: KPMG Analysis

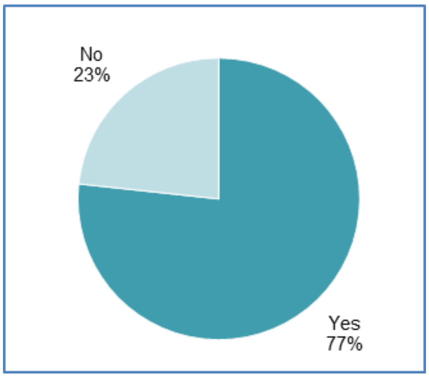
Royalties Payment

The sole Ghanaian copyright entity licensed by law to undertake collective rights management for musical works, sound recording and performances in Ghana is the Ghana Music Rights Organization (GHAMRO). Their primary function is to identify and document uses of music copyright works, and subsequently license, collect and distribute royalties accruing from such uses on behalf of its members- composers, authors, music publishers, producers and performers.

- *Spinners*

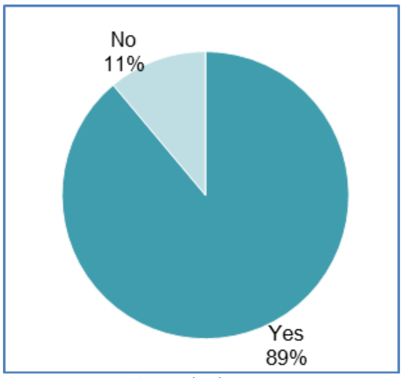
From the study, 77% of spinners sampled have obtained license from the Ghana Music Rights Organization (GHAMRO) and 23% have not been licensed. Out of spinners that have been licensed 89% pay royalties to GHAMRO and 11% do not pay royalties.

Figure 6.1.31 Spinners who have license from GHAMRO



Source: KPMG Analysis

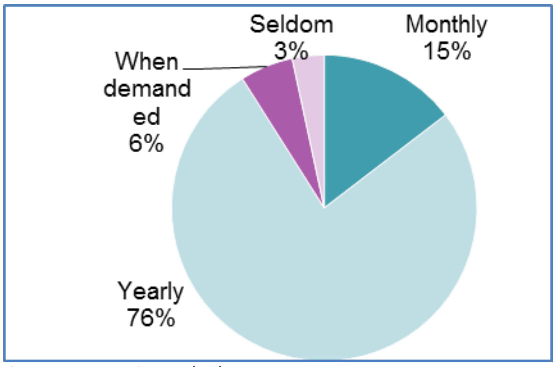
Figure 6.1.32 Licensed spinners that pay royalties



Source: KPMG Analysis

The study also showed that 76% of those who pay royalties pay yearly, 15% pay monthly, 6% pay when demanded and 3% pay occasionally.

Figure 6.1.33 Frequency of royalties' payments by Spinners

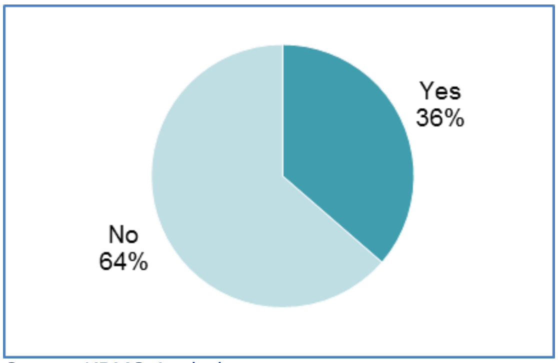


Source: KPMG Analysis

- *Artist Managers*

We observed from the study that, 36% of artist managers pay royalties on behalf of the artist they manage and the remaining 64% do not.

Figure 6.1.34 Artiste managers who pay royalties on behalf of their artistes



Source: KPMG Analysis

- Venue operators
- *Licensed venues by GHAMRO*

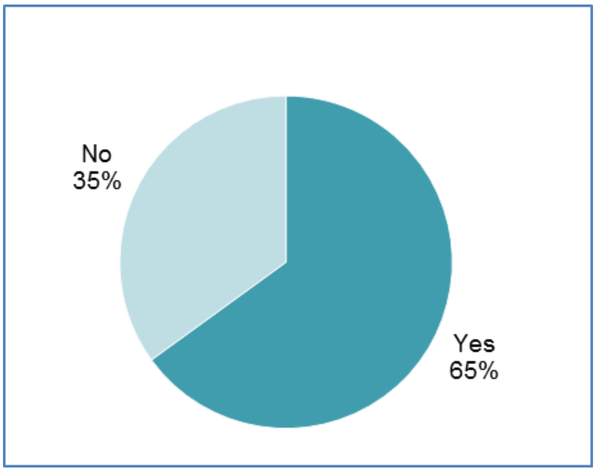
From the analysis, 65% of all respondents have obtained license from GHAMRO to play music publicly and the remaining 35% have not been licensed. The table shows that, 40%, 67%, 100%, 100%, 65%, and 33% of interviewees from night clubs, beach resort, cultural centres, foreign embassies, parks, hotels/restaurants and street events respectively have been licensed. All the school and university venue operators interviewed have not obtained license. 75% other operators like the pubs and bars have been licensed.

Figure 6.1.35 Licensed venues by GHAMRO

Licensed venues by GHAMRO	Responses	
Venue	**Yes**	**No**
Night club	40%	60%
Beach resort	67%	33%
Cultural centres	100%	0%
Foreign embassies	100%	0%
Parks	100%	0%
Hotel/Restaurant	65%	35%
School & university venues	0%	100%
Street events/carnivals	33%	67%
Others	75%	25%

Source: KPMG Analysis

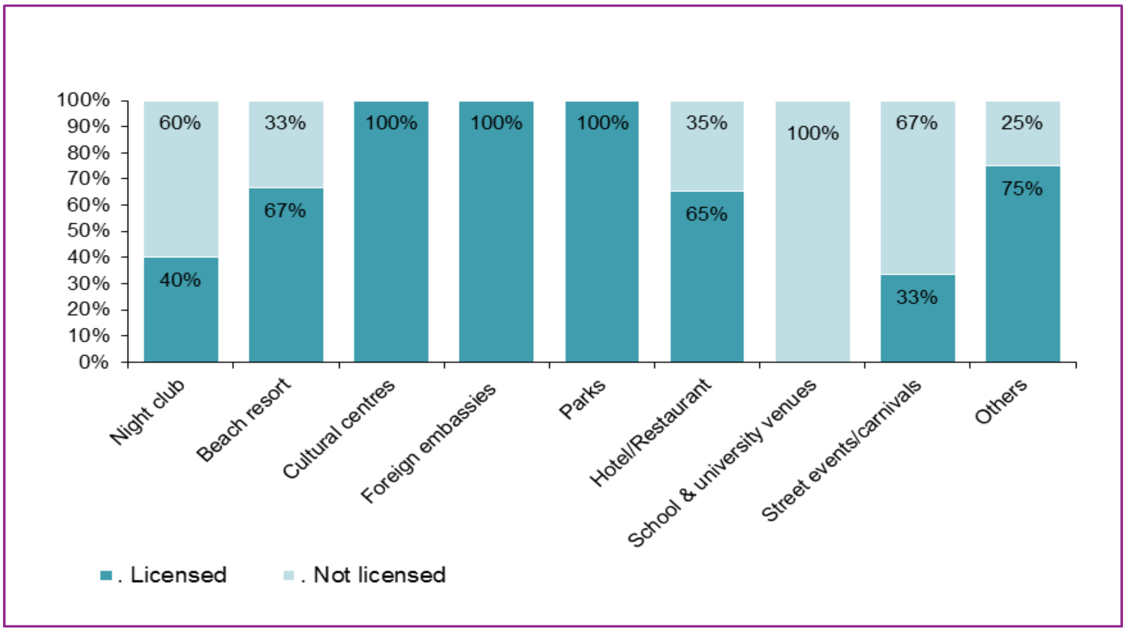
Figure 6.1.36 Venues who are licensed by GHAMRO



Source: KPMG Analysis

Below is a graph showing the percentage of venues that have obtained license.

Figure 6.1.37 Licensed and non-licensed venues



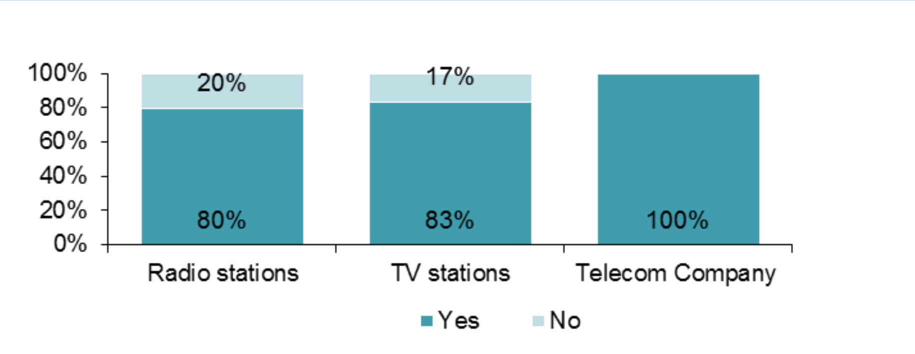
Source: KPMG Analysis

Radio, TV stations and Telecom companies

- *GHAMRO Licenses*

From the analysis, 81% of all respondent have obtained license from GHAMRO. 71 of interviewees from the radio stations which represent 80% of responses from radio stations have been licensed. With TV stations, 83% have been licensed and the remaining 17% answered ‘No’. It was also recorded that all telecom companies interviewed have license from GHAMRO.

Figure 6.1.38 Licensed companies



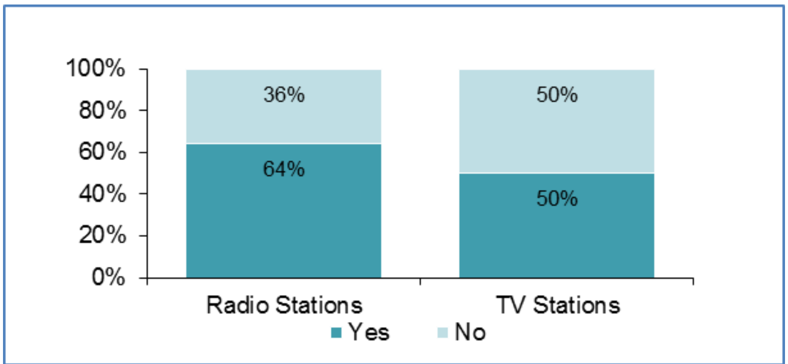
Source: KPMG Analysis

Radio and TV stations

- *Logging System*

The study also sought to determine if the radio and TV stations have a logging system. From the responses received, 64% of the radio stations have a logging system and 36% do not and with the TV stations 50% have a logging system.

Figure 6.1.39 Radio and TV stations with a logging system



Source: KPMG Analysis

6.2 Volume of production by Type

Volume of production by musical genre

Ghanaian musical content has been categorised according to genres and as far as this research is concerned, the study is limited to 14 of the most popular genres in Ghana. These are Gospel, Hip-life, Classic highlife (old time), Contemporary highlife (modern), Reggae, Afro beat/afro rock/afro jazz, Traditional/folkloric, Film/video music, Art music, Jazz, Choral, Brass band, Western and Others (Borborbor and R&B). Production according to the various genres is indicated in the Table 6.2.1.

Table 6.2.1 Percentage of music production according to the various genres

Musical Genre	Frequency	Percentage out of total number of Producers
Gospel	47	79.7
Hip-life	34	57.6
Classic highlife (old time)	28	47.5
Contemporary highlife (modern)	25	42.4
Reggae	16	27.1
Afro beat/afro rock/afro jazz	13	22

Musical Genre	Frequency	Percentage out of total number of Producers
Traditional/folkloric	12	20.3
Film/video music	9	15.3
Art music	8	13.6
Jazz	6	10.2
Choral	5	8.5
Brass band	3	5.1
Western	2	3.4
Other (Borborbor and R&B)	2	3.4

Source: KPMG Analysis

The research shows that, Gospel music is the musical genre produced the most by producers in Ghana. 79.7% out of the total number of producers produce Gospel music, followed by Hip-life and Classic highlife (old time), recording 57.6% and 47.5% respectively. Contemporary highlife (modern) follows with a percentage of 42.4. Reggae music is produced by 27.1% of the producers and Afro beat/afro rock/ afro jazz by 22% of them.

Volume of production by type of musical product (CD or cassette)

Based on our research, we observed that whereas every producer produces CDs, only 35.6% of producers still produce cassettes and this is indicated in the table below. This percentage of cassette production meets market needs of the rural and less developed communities who are much comfortable with cassettes. Even in the urban settlements, some commercial vehicles and homes still use cassette playing devices.

Table 6.2.2 Type of music product produced

Type of Music Product	Frequency	Percent
CD	59	100
Cassette	21	35.6

Source: KPMG Analysis

Volume of production by number of albums

The number of albums produced within the year by producers is indicated in the Table 6.2.3.

Table 6.2.3 Number of albums produced per annum

Number of albums	Frequency	Percent (%)
Above 5	21	35.6
3	13	22
4	7	11.9
1	6	10.2
2	6	10.2
5	6	10.2
Total	**59**	**100**

Source: KPMG Analysis

On the average, 35.6% of producers produce more than 5 albums within the year followed by 22% producing an average of 3 albums within the year. 11.9% produce 4 albums within the year. We observed that, 10.2% produce 5 albums within the year. The remaining 10.2% produce 2 albums within the year.

Volume of production by number of tracks

Table 6.2.4 Average number of tracks per CD album

	Number of tracks	Frequency	*Percent (%)	**Valid Percent (%)
Valid	10	21	35.6	36.2
	8	19	32.2	32.8
	12	4	6.8	6.9
	6	3	5.1	5.2
	15	3	5.1	5.2
	9	2	3.4	3.4
	20	2	3.4	3.4
	1	1	1.7	1.7
	5	1	1.7	1.7
	11	1	1.7	1.7
	16	1	1.7	1.7
	#Sub - Total	58	98.3	100
Missing	System	1	1.7	
Total		**59**	**100**	

Source: KPMG Analysis

*Percent: this percentage considers the frequency as a percentage of the total number of respondents (i.e. including those who did not answer the question).

**Valid Percent: this percentage considers the frequency as a percentage of the sub-total number of respondents (i.e. excluding those who did not answer the question).

#Sub-Total: this represents the total number of respondents less those who failed to answer a particular question

##Missing: this row indicates the number of respondents that failed to answer a particular question

Most producers produce 10 tracks per CD album followed by 8 tracks per CD album; this represents 36.2% and 32.8% of producers respectively. This totals to over 69% and the rest of the Producers (i.e. less than 31% of them) produce between 1 and 20 on the average even though one Producer failed to respond to this question.

The range of 8 to 10 number of tracks per CD album is the most common within the country, the less popular range of between 1 and 20 is for either promotional purposes or other separate ventures other than traditional market sales.

Table 6.2.5 Average number of tracks per cassette album

	Number of tracks	Frequency	*Percent	**Valid Percent
Valid	8	8	13.6	34.8
	10	4	6.8	17.4
	0	2	3.4	8.7
	12	2	3.4	8.7
	6	1	1.7	4.3
	7	1	1.7	4.3
	9	1	1.7	4.3
	13	1	1.7	4.3
	15	1	1.7	4.3
	16	1	1.7	4.3
	20	1	1.7	4.3
	#Sub - Total	23	39	100
##Missing	System	36	61	
Total		**59**	**100**	

Source: KPMG Analysis

*Percent: this percentage considers the frequency as a percentage of the total number of respondents (i.e. including those who did not answer the question).

**Valid Percent: this percentage considers the frequency as a percentage of the sub-total number of respondents (i.e. excluding those who did not answer the question).

#Sub-Total: this represents the total number of respondents less those who failed to answer a particular question

##Missing: this row indicates the number of respondents that failed to answer a particular question

We also observed that, 23 out of the 59 respondents answered this question. Again, 2 producers indicated that they do not produce any tracks per cassette. This indicates that 21 Producers representing 35.6% of them produce cassettes.

On the average, the larger proportion of cassette producers representing 34.8% produces 8 tracks per cassette, followed by 17.4% of them who produce 10 tracks per cassette. The rest of the producers produce between 6 and 20 tracks per album which are done by the smaller proportion of producers. These odd numbers are for special promotions or for specific purposes and not for regular cassette market sales.

6.3 Conclusion

Music value chain typically starts from the stage of music creation to the point of music consumption. Typically, created musical content must be financed, produced, recorded and edited before it is ready for publishing. Record companies/labels are responsible for producing, recording and editing the content. Publishing houses are also responsible for the aspect of publishing. Before musical content is available for consumption, it must be marketed, distributed and/or promoted. This is handled by marketing companies, distribution houses, touring agencies and merchandising houses. The intermediary stages could differ widely depending on the country's level of development. Royalties' collection is an important revenue generating component within the music value chain.

In Ghana, it is observed that music content creators are made up of composers, lyricists, arrangers, performers/singers, instrumentalists and club DJs. The production and distribution segments are made up of the following categories of professionals, the executive producers, record labels, publishers and distributors.

7 Regional and Local Sector Dynamics

7.1 Regional Features of the Sector

Ghana has many varied styles of traditional music due to its vibrant ethnic groups and geographic position in West Africa. The sound and movements vary from ethnic group and region. The southern regions of Ghana which comprises mostly the Akan States, the Ga-Adangbe, the Ewe and the Nzema make use of principally, percussion instruments such as atumpan, talking drums, atsimemevu, bomaa while the Northern sector uses aerophones, chordophones and idiophones such as the goje, xylophones, and castanets.

Generally, Ghanaian music incorporates several distinct types of musical instruments, many of which are in an ensemble setting. Almost all the music types have its corresponding dances which are organized at community events and activity for all occasions. Among the popular dances are Kpanlogo, Kundum, Kadodo, Apatampa, Adowa, Adzewa, Kete, Nwomkro, Fontonfrom, Kpatsa, Gota, Asafo, Agbadza, Agbekor, Fume Fume, Otu, Kple, Akom, Asafo, Bamaaya, Jira, Takai, Bawa, Epirede, Mpintsin, Akosua Tuntum, Oge and Gome, Below is how some of the music and dance have been categorized into regions.

- **Greater Accra Region**

The people of the Greater Accra Region love music, drumming and dancing. One of their best known traditional music and dance style is Kpanlogo. Musical activities of the Ga relate principally to political, recreational and religious activities. It's political or ceremonial music includes, Ofi performed during Homowo festival for the chief and elders and the priestly band and cult music such as Kple, Kpa, and Akom. Recreational music of the Gas includes, Sonte, Oge, Gome, Kolomashie, Konkoma and Kpalogo.

They have ceremonies such as outdooring, naming, circumcision and puberty rites that are integrated with music and dance. Tuesday is a day set aside in the week for the marine gods worship. On this day a canoe is sent into the deep to perform rituals. This practice is followed by music, dancing, drinking, blowing of horns and shouting at night. This is now incorporated in the Ga annual Homowo festival. Most of the songs sung by the fishermen are composed on the spur of the moment, during historical events, current events and incidents. The organization of music by Ga fishermen in this region is done on individual or group basis for religious expressions and group sentiments. All male music organizations are found in the work songs during the haulage of canoes, mending of nets and other marine fishing activities. The mixed musical organizations are performed in the recreational music and newly created Kpa festival music which is organized annually. The table below presents information on the various types of traditional music in the region (Aheneba, 2005).

Table 7.1.1 Regional characteristics of music and dance – Greater Accra Region

Type of music	Characteristics
Kpanlogo	This is a recreational music and dance by the Ga-Adangbe people of Accra. Movements in the dance reflect themes such as social issues, politics, expression of human feelings and topical issues. One of the popular and most basic accompanying songs “ABC” tells the story of the Ga folks learning the alphabet through to the letter “P”, and then taking a break to dance Kpanlogo. The songs combine social commentary and drum-language with roots in the ethnic idioms. Kpanlogo is usually performed by the Ga-youth to express their own creativity, topical and occupational themes along the coastal areas of Ghana. At present, Kpanlogo is performed in other communities, and institutions of Ghana and contemporary settings. Occasions of Kpalongo music making are varied such as festivals, funerals and call for performance of the music during visits of state dignitaries and during other state holidays. Instruments used include nono, nononta, dodompo, pati, tamalin, bongo drums, atswereshie, bugle and harmonica.

Type of music	Characteristics
Kpatsa	It is a recreational music for both sexes and is performed on various occasions such as yearly festivals, durbars of chiefs, funerals of members, visits of important dignitaries and general state celebrations such as Christmas and Easter. The kpatsu group may decide to perform for purely entertainment purposes. The dance is fast becoming the major traditional recreational music of the Adangbes. Instruments used include mingua (big drum), min wayo (small drum), gogota (double bell) and fau (rattle). Themes include topical issues, death, beliefs, marriage, love, work, history and philosophy of the people. Kpatsa music and dance originated among the Ga- Adangbe of southern Ghana. The performance provides an avenue for the youth to socialize, express their values and entertain themselves. The dance is characterized by sideways and forward shuffling of the feet, involving the use of short, brisk steps with the body slightly bent. The dance steps move the dancer either diagonally or backwards. With arms bent in front of the body, the right leg steps in concert with the movement of the right arm while the left leg steps at the same time as the left arm; while one foot remains flat on the ground, the heel of the other foot is lifted off the ground. Kpatsa is also taught and performed in some Ghanaian arts institutions and contemporary settings.
Gome	Recreational Gome is one of the oldest musical types performed by the coastal Ga of Ghana. This frame-drum and dance music appeared from late 19th century Accra through the interactions between Ga and Sierra Leonean artisans and fishermen. Originally, Gome a recreational music type was performed exclusively by fishermen after their expeditions to celebrate their catch. Other occupational groups especially artisans, also eventually adopted this music and dance as a form of entertainment. Presently, Gome is performed by all categories of people. Performance of Gome is distributed all over Ga but principally at Labadi and Accra. As a recreation music dance it is performed on all social occasion such as funerals, festivals and visits of statesmen. Gome bands are organized groups. Admission into any band therefore depends on one's musical ability and interest. The group performs only upon invitation, which attracts a token sum of fee. Instruments in a typical Gome ensemble are nono (double bell), maa (stick clappers), tamalin (frame drum) and gome (master drum). Gome song themes relate to human affiliations, social and topical issues and political events. Costume includes the use of very old dresses used by the Ga people and the colonial masters. Extensions of the body can be seen in the form of work tools carried and especially the walking stick. Women in Gome dress like old ladies with extensions of the buttocks.
Tokoe	Tokoe is performed among the Ga-Adangbe and the Ewe in the Tongu area of southern Ghana during initiation or puberty along with the learning of the activities of motherhood. The dance movements appear to be simple but stylish, and present the newly eligible girls to the community. Currently, Tokoe is also performed by some Ghanaian-African performing groups in Ghana and in contemporary settings.
Fume Fume	The energy and vigor of this dance takes your entire soul into another realm. The dancers wear grass skirts characteristic to that of the ancient warriors of the land. "Funtre ma ye ye yee"… a call for Fume Fume dancers, they charge into the dance ring. It is a creative dance with explosive energetic movements based on Ghanaian traditions
Kolomashie	The Kolomashie is a musical type that emerged in Accra in the 1930s before spreading to other Ga traditional areas. It is performed by the youth on various social occasions such as rite de passage and festivals. Instruments used include dodompo (castanet), tamalin, pati, brass drum, cymbal and shakers. Pieces played in a performance include blues, waltz, la congo, and highlife. Theme of

Type of music	Characteristics
	Kolomashie songs relate to various issues of life such as human affiliations, praise and ridicule, political figures, love relations, historical facts and greetings. Kolomashie is a free dance. Dancing is done in singles. The costume used includes a white pair of short knickers with multi-coloured shirt on top with a pair of canvas shoes usually without socks. Girls who may be dressed in any smart looking attire may however join in the performance when moved by the music.

Source: KPMG Analysis

- **Ashanti Region and Brong Ahafo**

The Ashanti and Brong Ahafo regions, all part of the Akan ethnic groupings have similar music characteristics. Music permeates all cultural activities of the Akans of Ghana such as their numerous festivals, naming ceremonies, marriage ceremonies, invitation rites and funerals. Music is therefore reserved for religious rites, recreation, economic and political situations. Bands are formed in communities to cater for the various types of musical activities. Music for religious activities includes Akom, Brakune and Tigare. Music used for social occasions like funerals are varied such as Adenkum, Adzewa, Adowa, Asonko, Asaadua, Atente, Sanga, Sikyi and music reserved for political situations or the courts of chiefs include Asafo, Mpintin, Apirede, Kete and Fontomfrom.

Music plays a major role in the socio-economic and political behaviour of the Ashantis. Many Ashanti kings were patrons of music who encouraged the creation or adoption of new royal orchestras. The creation of Nkofe horn ensemble, for example, is attributed to King Osei Kwadwo. Ntahera ensemble and Kete drum music are associated with Osei Tutu, the founder of the Ashanti Kingdom. King Opoku Ware, who succeeded Osei Tutu, is also remembered in Ashanti music tradition for using mpebi and nkrawari drums.

Research from the internet (rudell.wordpress.com) reveals that the expansion of the Kingdom often led to the enlargement of music organization in the court of the Ashantihene. The table below depicts types of Ashanti and Brong Ahafo music and dance and their characteristics.

Table 7.1.2 Regional characteristics of music and dance - Ashanti and Brong Ahafo regions

Types of music	Characteristics

Adowa music and dance	Adowa is by far the most widespread and frequently performed social dance of the Akan people of Ghana and it was originally associated with the Queen Mother of the Ashanti court. Adowa can be located in Ashanti, Brong-Ahafo, Kwahu, Akim, and among the coastal Makans. This dance is mostly performed at funerals, but can also be seen at yearly festivals, visits of important dignitaries, and other celebrations. Adowa songs are usually performed in cantor and chorus form with two or more soloist introducing a song before the chorus comes in. A standard Adowa ensemble has instruments such as adawura (boat or slit bell), torowa (rattle), petia (supporting drum), apentemma, dondo (master drum) and atumpan (master drum). Adowa songs relate to several issues such as historical facts, topical issues, cultural and social beliefs, death and life after death, praises and ridicule. The dance has an economic significance to the people in that the costumes such as kente are hand woven by the people. The regalia or ornaments such as anklets, golden rings and earrings are produced by the goldsmith. The drums and other instruments used are from the woodcarver and the blacksmith respectively. This keeps the people in of the community in business and provide livelihood for them. The culture of the people is also preserved through the dance.
Kete music and dance	Kete is commonly found in the royal courts of traditional Akan communities. In particular, the Ashantis perform the musical type in the courts of every chief whose status entitles him to be carried in a palanquin. It has always been the favourite ensemble of Ashanti Kings. The music can therefore be heard on state occasions such as durbars, enstoolment of chiefs, swearing of oath of allegiance of sub-chiefs, state funeral and national festivals like Adae, Odwira, Ohum, Ahobaa, Kunkum and Kurufie festivals of the Akans. Specifically, Kete plays a vital role during the installation and subsequent outdooring of new chiefs. In such occasions Kete, holds the entire durbar to dancing and music before the arrival of the new chief and his entourage. Though restricted to the chiefs, a queen mother may request for its performance during her installation. In funerals situations, Kete may feature for leading members of traditional associations or bands and heads of traditional organizations. Only royal funerals involving the chief's domain can use the Kete. Other funerals may use it only with permission from the chief. The instruments used are donno (hourglass drum), kwadum (pegged drum), apentema (pegged or hand beaten drum), petia, abrukua (pegged drum), dawuro (metal bell) and akasa (gourd rattle). It is danced barefoot and men in Kete performance put on cloth worn over the shoulder and the female counterparts put on any decent kaba and ntama. Only the chief can dance with sandals.
Nnwomkoro	This is a recreational music type performed exclusively by adult women in Brong Ahafo, Ashanti and Eastern region. It is mostly performed for entertainment and during funerals. The group may perform at wake-keeping in honour of a deceased member and during puberty festival such as Bragoro. Accompaniment of the songs is usually handclapping, castanets (a bell), dawuro (double bell), nnawuta and a prenpansua (an idiophone) with three tones. The themes of the songs are generally centered on loved ones and prominent members of the community. Nnwomkoro songs are a means of entertainment as well as a vehicle of communication.
Fontomfrom	This is warrior dance performed on state occasions in the Akan area of Ghana. It is the most important of all the state drum orchestras of the Akan. Full orchestra of ***Fontomfrom*** comprises two heavy drums, a pair of atumpan, adukurogya, pasa, brenko, apentemma and 'nnƆnka'. Fontomfrom pieces include topre. This is played in processions as the chief carried aloft in a palanquin dances with a gun in his hand or as he walks holding a gun or followed by gun men. At funerals it may be played as the chief goes around and at festivals in confirmation of his allegiance to his ancestors who were chiefs. All commoners must dance barefoot, and they must be stripped down so that their shoulders are bare (Aheneba, 2005).

Mpre music	Mpre is a light form of Adowa music. It is performed at wake-keeping and at funeral ceremonies. It is characterized by a relatively gentle pace. The donno is used for the performance of Mpre. Most of the themes of the songs are based on death (Antwi, 1988).
Sikyi music and dance	Sikyi is a form of recreational drumming and dancing which came into vogue not only with the Ashanti, but also in the whole Akan area of Ghana in the 1920's. It is characterized by dance postures and movements which simulate the dynamics of courtship through contrasting demonstrations of strutting and bobbing, theatrical elegance, pastoral innocence, and a band.
Ntan music	Ntan is a form of drumming and dancing which was at one time popular throughout the Akan area, including Ashanti. The drums found in an Ntan ensemble have always been considered art objects because they are decorated with very elaborate relief carvings each of which is symbolic as well. For example, the master drum is usually mounted on a tiger; the tiger in this context denotes the power of the drum in controlling the affairs of the occasion (Kwarteng, 1988).
Shrine music	These are cult music played in the shrine to the gods. Shrine music calls the gods (abosom) to possess the okomfo (shrine priest/priestess). Music is also played during healing ceremonies to call the gods and for effective communication with the priest/priestess at the shrines. At the shrines effective healing is closely tied to the strength of a god, and the strength of a god is closely tied to the quality of the drumming. There is also a direct link between the quality of music at a shrine and an okomfo's ability to heal patients. The abuko and adaban rhythms, both of which are traditional dance rhythms, are played during the ceremony to excite and energize the okomfo. These dance rhythms are especially important in preparing the okomfo to be possessed by an abosom and in keeping them energized while possessed.
Asaadua	Asaadua (name of a sweet berry) was previously a popular recreation musical type among the Akan people of Ghana. Its performance is now limited to some few communities in Ashanti and Brong Ahafo regions. Like other popular entertainment music, which evolved from the ingenuity of some veteran traditional musicians, Asaadua started as a youth recreational music for the men of the Akan tradition. Asaadua is principally performed for recreation on any social gathering that requires merry making. Some of the instruments used include nnawuta (double bell), firikyiwa (castanet), adawura (boat or slit bell), torowa (rattle), donno (hourglass drum) and tamalin (frame drum). Themes of Asaadua songs relates to human relations and topical issues. Participants put on any decent attire when performing. During funerals they perform in their mourning cloths. During special festivals, durbar of chiefs or visit to state dignitaries the female participants may be seen in the adowa costume and the men in the usual cloth worn over the shoulder.

Source: KPMG Analysis

- Eastern Region

Table 7.1.3 Regional characteristics of music and dance – Eastern region

Type of music	Characteristics

Apiredwa music	Apiredwa music is used at occasions such as festivals, installation of chiefs, crossing of rivers (for example river Birim to Dadaso), pouring of libations, births, outdoorings, funerals and social gatherings. During festivals, it is used to summon the gods and ancestors during the climax of the festival. The master drum atumpan is used to address chiefs in a form of praises, proverbial and at times the master drummer can drum directions to a dancer. Apiredwa instrumental ensemble consist of non melodic idiophones such as first, second and third dawuro (agyegyewa, asonka and bupe respectively) and membranophones such as paso, apentema and donno all supporting drums (Aheneba, 2005).
Klama	Klama music and dance is associated with puberty rites of the Krobo of Ghana. The celebration of this music and dance highlights the "outdooring" of girls who have undergone intensive tutoring in mother craft. Klama is now performed on various social occasions. Klama performances also re-enact important historical events of the Krobo people (Aheneba, 2005).
Agbaei	Agbaei is another social music and dance of the Krobo of Ghana. It is flirtatious in nature. Oral history has it that Agbaei was founded when the elders of the Krobo land in their early days of settlement realized that the youth were having problems with "Dating." The young men and women were therefore compelled to participate in this music and dance so that they can gather some tips to help them in real life situations (Aheneba, 2005).
Gyewani	Gyewani recreational music and dance is peculiar to the people of Nyamebekyere in the Akwapim Traditional Area of the Eastern Region of Ghana. Bamboo is cut to various lengths, and it is used in making music. This gave birth to the Gyewani Bamboo music and dance (Aheneba, 2005).

Source: KPMG Analysis

- **Northern Region**

Traditional music in the Northern Region is usually played during occasions such as funerals, naming ceremonies, national day celebrations, festivals, durbars, weddings and outdoorings. The region engages in various festivals such as the Damba, Bugum, Chugul ,Gobandawu (Yam) , Chimsi Chugu (Ed-Il-Adha) , Konyurichugu (El-Il-Fitr), Kpini Chugu (Guinea Fowl) and Sonyor Deng . Music plays a significant role in all these festivals of the region. Traditional music and dance in the area includes Bamaaya, Jira/Jera, Bambaya, Goonji, Takai, Kinatsu, Nmane music and Tora.

People of this region base musical composition on stringed instruments, wind instruments and voice, with poly-rhythms clapped or played on the talking drum, gourd drums or brekete. Due to the absence of forest in the northern savannah areas of Ghana large carved drums are not found. The region is also noted for gyil music and also singing a single syllable of text while moving between several different notes in succession. A long history of griot praise-singing traditions exists among the various groups in Northern Ghana. The following table presents details of music played in the Northern Region. An important neo-traditional music found in the Northern region is simpa that the Yendi youth created in the 1930s by fusing Dagbon recreational music with highlife influences from southern Ghana. Simpa then spread from Yendi throughout the Northern Region and is still popular with the youth there today.

Table 7.1.4 Regional Characteristics of music and dance - Northern Region

Type of Music	Characteristics
Bamaaya music and dance)	Bamaaya music and dance which means “the river (valley) is wet”, is the musical type commonly found among the Dagombas of Northern Ghana. It began as a religious musical performance, but now functions during funerals, festivals, national day celebrations and other social occasions. Originally, only men took part in the dance while women watched, sang, shout praises and encouraged the dancers. Now, Bamaaya is for both genders. Dancing Bamaaya requires a lot of waist shaking and twisting. Costume in Bamaaya includes Mokuru (a skirt worn around the waist) and Zupilag (head turban, hat or headgear). Extensions of the body can be seen by the use of secondary rattles worn around the ankles to emphasise the dance movements, earrings, spectacles (dark), towel put around the neck to clean sweat and fan. Instruments used are the main Dagbon traditional musical instruments such as Gungo (Brekete), Lunna (Dondo), Siyalim (Rattle) and Kalamboo (Flute). Themes of Bamaaya songs relate to very many issues of life such as historical, topical, religious, social and cultural beliefs of the people.
Jira/Jera	Jera was some form of religious rites performed when hunters were returning from their hunting trips, and later after midnight at the funerals of chiefs and elders. In the olden days it was seen as a ritual dance for hunters performed before and after expeditions. Currently, Jera is seen on many social occasions. It is performed by most Dagomba villagers during festivals, funerals, durbars and for recreational purposes after a hard day’s work. The costume used includes the wearing of magical amulets on the bodies of the dancers. The dancers keep their upper bodies steady and move their hips in a forward and backward manner. Their legs have a purposeful movement and their waists are covered with a belt with strands of cowries which rises and falls. Other costume in Jera includes Krugu (long knickers), Laypara (cowries), Zupliga (hat), Chayla (secondary rattles), Guru (talismans), Zule (short whiskers), Fiena (castanet), layamini (cowries), kpekpeli (bulging object). Songs in Jerra are mainly praise songs. Themes centre on crisis coming in the form of warnings and pieces of advice. Instruments used include Gungon, Luna, Siya Lim and Yua.
Bambaya	This traditional music and dance comes from the Dagomba of Northern Ghana. Originally, the dance was only performed by men who danced in women's costumes. Recently, women have begun to perform as well. The movements are said to shake mosquitoes away. The music and dance are often performed to celebrate the birthday of the prophet Mohammed.
Goonji	The Goonji is a one-stringed fiddle with a calabash resonator covered with skin. It is bowed with a curved bow, strung with horsehair, or in some cases with artificial hair used in weaving women's hairstyles. It is played in an ensemble of two or more Goonji along with accompaniment from Zaabia, which are rattles made from a gourd with the seeds sealed inside rather than strung outside. The musicians can be called to play at funerals, festivals, weddings, outdooring of babies or any occasion for celebration. The music itself is formed around praise names of chiefs. The fiddles will play one part on the praise name over and over while the singer will improvise, and the lead Goonji player will play variations off the main phrase.
Takai music and dance	Takai music and dance is a royal piece of art performed by the Dagomba chiefs and princes. It is performed on festive occasions such as the annual Damba festival, political rallies and the durbar of chiefs. It is danced only by men. Takai movements involve pivot turns, torso swings and stamping to the rhythm of the Lunna and Gungon. These are the only instruments used to play such music. Currently this music is danced to as a celebration of peace. The dancers swirl and strike together metal rods instead of swords.
Kinatsu	Kinatsu is a warriors/hunters dance of the Konkonba tribe of Northern Ghana. Although it began as a warrior’s musical performance, it now functions as a harvest dance during

	funerals, festivals, national day celebrations, and other social occasions.
Nmane music and dance	This is a wedding music and dance of the Dagomba women of Northern Ghana. This music is performed exclusively by women in honour of a new bride. Songs used in this celebration relate to typical human, marriage and other social issues.
Tora	Tora is a Dagomba women's musical type. It is presently performed all over Northern Region of Ghana. Specifically it is performed by the Mamprusus, the Nanumbas and the Dagomba's. It is recreational dance music. It is however performed at funerals, wedding ceremonies, public durbars, festivals and visits of state dignitaries. Instruments used include Gungon and Lunna. Singing forms an essential part of Tora performance. A good performance is therefore attributed to effective singing that takes place. Song texts are based on several themes such as reflections, historical facts, praise and ridicule, advice and human affiliations. Costumes in Tora are varied. In funeral situations anything decent is worn but on very organized occasions like festivals or visits of state personalities, the performers put on the traditional chinchin maga, the local woven cloth. Tora is not an organised dance therefore any able bodied woman may join in its performance.

Source: KPMG Analysis

- **Upper East Region**

The people of the Upper East region consists mainly; Mole-Dagbon, Grusi, Mande-Busanga and Gurma ethnic groups. The region host so many festivals throughout the year, most of which are either to bring a good planting season or celebrate the harvest. Typical examples of these festivals are Gologo, Fao, Paragbiele, Willa, Zumbenti, Kobina, Kakube, Feok and Builsa.

Music plays an important role in the social life of the indigenes and features on most social occasions including the various festivals of the region. The main traditional music played in the region is Nagla. This is a music and dance performed by the Kasena-Nankeni people of Paga and Navrongo. In the olden days, it was performed at funerals but today, even though it still maintains this function, it can also be seen on most social occasions excluding marriage ceremonies. Movements of Nagla reflect the spirit of togetherness.

- **Upper West Region**

The main ethnic groups in the upper west Region are; Dagaaba, Wala and Sissala. The indigenes have peculiar kind of music which is played during occasions such as funerals, festivals, naming ceremonies, merry making or just to welcome new folks into the community. Notable festivals are the Kobine, Kakube, Wilaa and Zumbenti in Kaleo.

The table below depicts the type of music played in the area.

Table 7.1.5 Regional characteristics of music & dance – Upper West Region

Type of music	Characteristics
Bawa	It is also known as BEWAA. It has a dance called the BAWA dance. It is recreationally danced to by the youth of the Dagarti traditional area. It is a traditional harvest dance which is done to commemorate the end of a successful farming season and also appeal to the gods and ancestors for the success of next year's crops. The Bawa dance incorporates many movements often seen in fieldwork such as threshing and planting, in a stylized manner.

Source: KPMG Analysis

- **Western Region**

Traditional music in the Western Region is generally organized as a social event. Public performances therefore take place on occasions when members of a group or a community come together for leisure or recreational activities or the performance of rite, ceremony, festival or any kind of collective activity such as clearing of paths, going on a search party or the construction of pit latrines. The table below depicts details of music and dance in the region.

Type of Music	Characteristics
Kundum music and dance	This is performed as part of the annual Kundum festival of the Ahanta and Nzema people of Ghana. Although traditionally a harvest music and dance, Kundum can now be seen on all social occasions. Kundum is performed in two to three sections: The first is *domo*, a slow movement, in which dancers evoke beauty, majesty and gracefulness with stately postures of tilted bodies. The second section *ewulay* (literally meaning "pumping"), inspires fast and masculine movements. The third section *edudule* consists of vigorous torso to torso movements, strutting movements of the body. The act of "plucking" in the fields is dramatized in the Kundum dance.
Abisa music and dance	Abisa music and dance is performed at the Abisa festival of the people of Nzema. Abisa music is the most dominant single phenomenon in the festival. According (Amenlema, 2006) in his thesis, Abisa was introduced to and accepted by the Nzema based purely on its music as it is a festival which takes musical instruments as its central symbol and has developed music as its central ritual event. The instruments of the Abisa ensemble consist of drums of different sizes and pitches. The materials for creating them consist of wood and animal hide, metal and bamboo. These materials correspond with the drums, the metal gongs and planks. Drumming is done by using membranophonic instruments, idiophones such as frikyiwa (castanet), elawule (bell) and sometimes toba (bottle) and kokoba (bamboo planks) Drums are the most important instruments in the ensemble. There are four drums in Abisa music, each with its own distinctive pitch and tonal patterns.

Table 7.1.6 Regional characteristics of music and dance - Western Region

Source: KPMG Analysis

- **Volta Region**

Music exists in this region for rite of passage, work, religion and recreation. Here music is played as part of a traditional ceremony, a ritual or a special event with which they are connected. The accompanying music is performed at specific points in time either as a prelude, interlude or postlude. For controlled contextually bound performances, music such as Atrikpui, Atamga, Aavu, Yevevu, Kokuvu, Atsiagbekor, may be played. On social front for leisure, recreation, pleasure or during funerals and festivals or any social event music such as Adzogbo, Kinka, Gota, Gahu, Agbadza, Tudzi and Boborbɔrɔ may be played. Among the Ewes of southeast Ghana, drummers must also be proficient dancers, and dancers are often required to become musicians as well. Ewe instrumentation is largely percussion-based and includes talking drum, double or single gong, and gourd rattle played in complex, polyrhythmic patterns. Instrumentation varies depending on the nature of the occasion.

The following table presents types of music in the region (Adzei, 2004), (Younge, 2001), and (Lawrence, 2005).

Table 7.1.7 Regional characteristics of music and dance – Volta Region

Types of Music	Characteristics

Types of Music	Characteristics
Borborbor	Borborbor is the most popular style of recreational music in the Volta Region. This drum dance appeared in the Kpandu area around 1950 as a fusion of konkoma highlife with local Ewe recreational music styles such as the Akpese. In its early days bobobo (or borborbor) was associated with the independence movement and indeed it was known as “Nkrumah’s own borborbor”. Boborbor currently features mostly at funerals, festivals, durbar of chiefs and visits by state dignitaries. Themes of Boborbor relate to almost every aspect of life, though religious and funeral themes are very prominent. Instruments used includes krentsiwa (castanet), kaye (container rattles), vuvi (supporting drum), asivui (supporting drum), pati (supporting drum), donno, vuga pati drum (locally made copy of a small military side drum), congas and bugle. This is a social dance with a great deal of room for free expression. It links traditional drumming rhythms with proverbial lyrics that frequently include Christian themes. In general, the men sing and dance in the centre while the women dance in a ring around them. Women singers carry two white handkerchiefs that they twirl in the air at the end of a drumming period. Everyone in the community may participate in these performances which usually begin at dusk and can continue well into the night and even until dawn.
Gota	Gota music and dance was originally performed at cult or religious worships, funerals and festivals. It was used to enhance ritual performed and also to invoke the spirits of the deity they worship. Presently Gota is now a youthful recreational music performed by men and women, the aged and children. It is currently being performed at funerals, traditional festivals and life cycles events, in association with the Christian church, marriage ceremonies and enstoolment of chiefs, puberty rites and initiation rites. Gota groups also normally perform on occasions such as independence day, new year’s day, Easter Monday and other important public days in the life of the community. The groups are normally invited by the family members in cases where the deceased is not a member of the group and this is usually at a fee. Gota uses the mystical calabash drum of Benin, West Africa. Gota costume consists of an Atsaka and a cloth around the waist with any type of shirt for men. Women performers use a cloth around the chest.
Gbolo(love music and dance)	Gbolo music is, according to the musician Kenn Kafui, a neo-traditional music associated with the 1920’s Ewe traditional composer Gbolo Komla Vebleame of Alayanyo Vudidi in the northern Volta Region. Because of its erotic and seductive nature this music was not liked by the Ewe elders, who had him arrested in 1931 and imprisoned in Accra for one year. However, after Gbolo Komla was released from James Fort prison for composing this controversial love music his Gbolo music became even more popular amongst Ewes - and it also took on the names Egbanegbe (we’ll play even if the drums are broken) and later Gabada. The music can be performed during celebrations especially at wake-keepings for dead members, dead associates of a member or an engaging the Gbolo band. Modern day performances can be seen at festivals-yam festivals, durbars of chiefs and marriage ceremonies .Gbolo music is now accepted in some churches where songs composed in the medium are sung accompanied by the full Gbolo instrumental accompaniment. Gbolo is principally a women’s performance. The few men involved only handle the drums. Instruments of the Gbolo ensemble includes akaye (container rattle), akoge (castanet), gankogui(double bell), adondo (hourglass drum), vuvi(small supporting drum) and vuga(big drum) In terms of costume, women wear a particular cloth up to the chest and extend their buttocks by stuffing them with pieces of cloth. As Gbolo features mostly in funeral situations, themes dealing with death are given prominence .Other themes relate to topical issues, anti social practices, advice to the youth, the environment or abode, puberty, riches and historical facts.
Gahu	According to the musicologist Professor Kobla Ladzekpo, Gahu (or Agahu) was created by Egun speaking people in the Republic of Benin in the 1930 .They subsequently took this neo-traditional music to the coastal Nigerian town of Badagare

Types of Music	Characteristics
	where Ewe fishermen were working and picked up the music. In 1950 one of these fishermen, a certain Kofi Dey, brought this drum-dance to the southern Volta Region. The performance derives from its meaning the musical expression of very important or rich people in the society where it is perpetuated. It is very popular in areas like Dzodze, Sakpa, Tadzewu, Aflao, Denu, Anlo Afia, Denyigba and other Southern Ewe communities. As music for entertainment, Gahu features for recreational and social functions such as marriage and wedding ceremonies, festivals and durbars. It can also be seen at funerals of a deceased member or upon invitation of the group. Costume used is Agbada, worn by both men and women. Extension of the body can be seen in the use of very expensive dark spectacles or sun glasses, heavy chains or beads around the neck and wrist and holding handkerchiefs. The modern traditionally accepted instruments of the Gahu ensemble are Toke (slit bell), Gankogui (double bell), Axatse (rattle), Kagan (supporting drum), Kidi (supporting drum), Agbobli and Ggboba. Themes of Gahau music relates to historical, philosophical, topical and human issues. This historic origin can be seen today in the rich Yoruba costume worn by dancers. Agahu is both the name of a dance and of one of the many secular music associations (clubs) of the Ewe people of Togo, Dahomey, and in the South-Eastern part of the Volta Region in Ghana. It is performed at social gatherings. Each club owns distinctive drumming and dancing styles, as well as their own repertoire of songs. In dancing the Agahu, two circles are formed; the men stay stationary with their arms out and then bend with a knee forward for the women to sit on. They progress around the circle until they arrive at their original partner.
Tro-u	Tro-u is shrine music. It is also an ancestral drum music that is played to invite ancestors to special sacred occasions at a shrine. For religious purposes, a priest or priestess would be present. There are fast and slow rhythms that can be called by the religious leader in order to facilitate communication with the spirit world. Three drums and a double bell are the instruments used for playing Tro-u music. The bell rhythm is played on a boat-shaped bell in the north, but the southern region uses a double bell. The three drums used must have distinct pitch levels in order to lock in.
Sowu	Sowu cult music is one of the seven different styles of drumming that belong to the cult of Yewe. Yewe is the God of Thunder and lightning among the Ewe speaking people of Togo, Benin, and in south-eastern parts of the Volta Region in Ghana. Yewe is a very exclusive cult and its music is one of the most developed forms of sacred music in Eweland. In recent years Sohu has been choreographed for the modern stage.
Agbadza	Agbadza is among the oldest musical types performed by the Southern Ewe of Ghana, Togo, Benin, and parts of South-western Nigeria. As a social and recreational music and dance, its performance is open to everybody in the community irrespective of class, age, sex, and religion. Agbadza is derived from an older war dance known as Atrikpui. The dance is performed in almost every town or village. It is also known as a funeral dance and can also be heard on other national festivals, visit of state dignitaries and other religious festivals to the gods of the land. There are five sections or movements in Agbadza performance: Banyinyi- a short introductory piece that is performed as a prayer to the gods and the ancestors, Vutsortsor- the main dance section, Adzo- a less-vigorous dance section, during which only the master drum, sogo accompanied by gankogui and axatse are used, Hatsatsa- song cycle, during which topical, historical, philosophical, and reflective

Types of Music	Characteristics
	songs are performed and vutsortsor- another round of the main dance section, which may last for several hours. Themes of Agbadza relate to several topics of interest. Instruments of the ensemble include sogo (master drum), kidi (supporting drum), kagan, (supporting drum), gankogui (double bell), asatse (rattle) and atimevu (a tall master drum). Costume used has the ordinary kaba and cloth for ladies and any attire with cloth around the waist for men.
Adzogbo	Adzogbo originated from Benin (Dahomey) as a Dzovu (spiritual/religious) music and dance. It is played for entertainment during festivals and other social occasions. It was called Dzovu, in that during any performance, the men participants would display their Dzoka (juju/charms) especially the so-called "love charms" to seduce women. When this music was brought to Togo and later Ghana in the late 19th century, its function changed. The south-eastern Ewe of Ghana now performs it for entertainment during festivals and other social occasions. The women's' section of the dance is called Kadodo.
Atsiagbekor	It is a war dance performed after battle and now performed at social occasions. Atsiagbekor is among the oldest traditional dances of the Ewe-speaking people of Southern Ghana, Togo, and Benin. The musical types in Ghana are notably performed by the people of Aanyako, Dzogadze, Anlo Afia Denyigbar, Anloga, Kedzi and Afloa. Originally a war dance performed after battle when the warriors returned to the village, it is now performed on many social occasions such as during funerals of important chiefs, stool festivals, state festivals and by professional and amateur cultural groups for entertainment. Instruments in the Atsiagbekor ensemble are, Gankogui (double bell), Axatse, Kagan, Totodzi, Kloboto, Kidi, Sogo (supporting drum) and Atimevu (master drum). Themes of the song, concern circumstances of war. Most of the songs contain historical references to their chiefs, war leaders, migration stories and themes relating to the invincibility of the Ewes against their enemies, themes of loyalty, bravery, and death.
Babasiko	Babasiko is a recreational music and dance of the South-eastern Anlo Ewe of Ghana, performed mostly at social gatherings such as festivals and funerals. Babasiko is flirtatious in character. Its characteristic form is the strutting and bobbing up and down and a display of theatrical elegance. The dancers portray courtship through movements of the arms, eyes and total facial expression. Proposals of intimacy can be seen accepted or rejected through bodily gestures.
Gadzo	Gadzo is a war-dance drama of the south-eastern Anlo Ewe of Ghana, which came from Notsie in the Republic of Togo. Originally, this music and dance was performed after wars so that the warriors could re-enact battle scenes for those at home. Presently, Gadzo is performed during ancestral stool festivals (Zikpuiza), state festival (Hogbetsotso), funerals of important chiefs and members of the group, and by professional and amateur groups for entertainment.
Akpese	The Akpese music is one of the neolocal musical types performed by the people of Tsito Awudome. Basically it is performed by both the elderly and the youth on occasions such as outdoorings, installations of chiefs, marriage ceremonies, festivals and funeral places. It is also performed as recreational music for people who needed the services of the group. Instruments used for Akpese music includes Akoge (bell), Wuvi, Asiwui, Benda and Wuga. Akpese is performed to lighten the mood and lift up the morale of the people.

Types of Music	Characteristics
	Akpese also brings a special sense of joy and happiness to the people. Incidentally, it is this northern Ewe Akpese social dance that was blended into Konkoma highlife in the 1950s and resulted in the previously discussed borborbor music.
Gbedze	Gbedze is war dance music of the people of Tsito in the Volta region. Originally, Gbedze was a male dominated ensemble with only two women. Three drums, two dondo and a bell are used in Gbedze. The three drums (Vuga, Asivui and Vuvi) are curved out of wood and covered with the skin of an antelope. The only aero phone used is a horn of a cow also called Nyidzo. A local blacksmith constructs the bell to suit the desires of the members. Gbedze is performed on serious occasions such as the death of a warrior, death of a chief, installation of a new chief and during the celebration of the annual Yam festival.
Gabada	Gabada is a very popular recreational music among the northern ewes of Ghana. As a social music activity, Gabada is performed for recreation at funerals and festivals of the people, national celebrations and visits of state dignitaries. Instruments of the ensemble are Slit bells (Dawuro), Akaye, Vuvi and, Asivuvi. Theme of Gabada songs may centre on love, death and morals. As mentioned earlier Gabada is a later name for the Gbolo and Egbenegba 'love' music.
Atrikpui	Atrikpui music and dance is performed in the entire region of Southern Eweland. The music is performed at burial and funeral rites of very important elders of the community such as chief's and very old people. In Anloga, it is performed when a male dies through lorry accident. Other occasions where Atrikpui is performed includes yearly traditional festivals, rites for the state deities and during the yearly festivals organized for the gods. During performances, the men wear Atsaka. Women performances put on the usual cloth and blouse. Instruments used in Atrikpui are Agbobli (master drum), Kpatsa, Kagan (supporting drum), Atopani (talking drum), Agblovu (talking drum), Tavuga (supporting drum), Gankogui (bell), Axatse (rattle)

Source: KPMG Analysis

- **Central Region**

Music in the Central Region is performed during the enstoolment of chiefs, festivals and the funerals of paramount or prominent chiefs.

The celebration of various festivals displays some forms of music in the region. During the Fetu-Afahye festival for instance, all the citizens of the town come out to witness a procession of the priest and priestesses of the town till day break. This is amidst drumming and singing of traditional songs as the priests and priestesses make their evocations for the coming year. The table below depicts types of music played in the region (Acquah, 2000).

Table 7.1.8 Regional characteristics of music and dance – Central Region

Type of Music	Characteristics

Asafo Music	Asafo exists in all Akan states such as Agona, Efutu, Enyan, Breman, Assin, Ajumako, and Ashante. There are five types of Asafo music such as Sor, Famu, Atopr, Wambir and Asafoese. Asafo music was originally the war music of the Akan male youth or age-sets that were formed into warrior groups (i.e. Asafo companies). Asafo genre has its performance linked to royal funerals of members and search party and the activities of the cult. Principal occasion for performance is the traditional festival. It is used in performing annual Ahorba and the AkwambƆfestivals as well as funeral rites. The visit of any prominent persons such as chiefs, assembly men, parliamentarians, the president and other traditional sub-chiefs, durbar grounds and fund raising. Currently Asafo members go through formal training in addition to the informal training they have acquired from childhood lullabies. Learners are sent to the outskirt of the town deep into the forest where a shed is built. Master drummers teach them the techniques of playing all the instruments in the ensemble. Adult drummers stand behind the learners and demonstrate the rhythmic patterns of the drums. Instruments used includes Dawuro (bell), ansƐwa (little-sized drum), konkon (larger than the anserewa), pentsen or ampaa (middle-sized drum), epusuw (larger than those mentioned) and the asafokyen (master drum) other instruments dawurnta (double bell), adawurasa (triple bell), adƆmba (bell), pataku (a type of horn). Occasions where the five types of Asafo music are performed is described below. • Ɔsor-Performed during traditional festivals and other occasions such as welcoming a prominent person or installing a chief • Famu-During traditional festivals and other festive occasions such as outdooring of a chief, installation of a chief or welcoming any prominent person • AtoprƐ-Performed for the dead. Used during burial as well as when remembering departed souls at the yearly traditional AkwambƆ festival. Performed when the deceased is being conveyed to the cemetery and when it is being put in the grave. • ƆwƆmbir-Performed during normal procession of the Asafo in the streets of the town • Asafoesi-Performed for the gods, especially when performing rituals at the shrine during the traditional akwambƆ festival. It is also performed to provoke enemies
Adzewa dance	Adzewa is performed during the enstoolment of chiefs, festivals and the funerals of Paramount or prominent chiefs. Originally, Adzewa was a dance only performed by females but in its modern context the dance features men as well as women. Adzewa doesn't have one standard song associated with the dance. Thus depending on the message of the song the role of the men in the dance will change.
Adaha	The first form of the High Life music appeared in the 1880s with the local brass bands of the Fanti coast playing "Adaha." This form adapted the brass instruments from both the British and the West Indian regimental musicians stationed at the British Cape Coast colonial administration. During the 1930s the poorer Fanti villages who enjoyed adaha brass band music developed a poor man's' version called Konkoma (or Konkomba) using local frame-drums and voices instead of expensive imported brass band instruments. Konkoma then spread throughout southern Ghana and also moved eastwards through the Volta Region reaching as far as western Nigeria by the 1940s.
Coastal Fanti Osibisaaba	During the late 19^{th} century Kru seamen of the Liberian coast contributed an African-form of cross-fingering guitar music (two finger plucking technique) to local percussion music, resulting in the early 1900s in various forms of early West African guitar music: such as Sierra Leone maringa, Nigerian Yoruba juju-music, Cameroonian makossa music and the 'dry' acoustic guitar style of Central Africa. In the case of Ghana the Kru sailors

	and stevedores influenced Fanti musicians such as Kwame Asare (aka Jacob Sam) and George William Aingo. They started recording this music from 1927 calling it “Osibisaaba”, probably deriving the name from the “osibi” recreational dance (and musical wrestling) of young Fanti fishermen. The original dance associated with osibisaaba guitar music was initially a typical African counter-clockwise ring dance – but through the efforts the famous 1920s lady dancer Yaa Amponsah western type ballroom dancing was later added.
Religious Music	Religious music serves as a crucial element of worship and praise. It can be generally traced back the appearance of vernacular hymns and choral music associated with the emergence of breakaway African Christian churches and the rise of nationalist sentiments from the late 19th century (Ephrain Amu, for instance, is linked with this movement). However, an even earlier form of Africanised hymns were the Abibindwom or ‘Fanti Lyrics’ created by the Fanti Methodist catechists in mid 19th century Cape Coast. In abibindwom music of the Fanti people, the translation of Christian hymns into local languages has resulted in an entirely new genre that draws on features of both Christian religion and Fanti drumming. Similarly, groups like Ogoekrom Brass Band from Ghana's Central Region have taken European instruments and hymns and reinterpreted them, creating music that embraces the powerful rhythmic characteristics of Fanti music, and resembles the distinctive sound of the mmensoun ensembles that feature traditional horns made from wood and string or elephant tusks.

Source: KPMG Analysis

7.2 Conclusion

Ghana by its natural geographic orientation is endowed with rich cultural practices that portray the values of athe society. Each region in Ghana has its unique dance and its accompanying song that defines the ethnic grouping. The Ashanti and Volta regions are examples of typital regions with rich festivals where some of the dances and songs are showcased to the outside communities. Over time some of these traditional songs and dances have been blended with contemporary music to make them attractive. The ability to sustain these traditional music will serve as a sustainable source for folkloric music which will tell the history of the particular region where the songs and dance originate from.

8 Regulatory Framework

8.1 Review of Regulations

This section presents a review of the legislations that affect the music sector. The key legislations that were reviewed are the Copyright Act 2005 (Act 690), Copyright Regulations, 2010 (L.I. 1962), Electronic Communications Act, 2008 (Act 775), and the Electronic Communications Regulations 2011 (LI 1991).

Table 8.1.1 Regulatory review

Legislation	Observation	Some Weaknesses
Copyright Act 2005 (Act 690) **Copyright Amendment Act 2009**	The Act is the major regulation for the sector. Key provisions from the Act are presented below: • **Copyright Protection** The Act provides protection for musical works and sound recordings of authors, co-authors or joint authors. The Copyright Office has been established to administer the registration of musical works. Authors have to present their works to be identified as their creation in order to protect their rights. Even where the work is not presented for registration, it can be protected if the author is able to prove that he is the originator of that work. • **Economic and Moral Rights** The Act protects the economic right which entitles the owner to commercialize the work in order to generate income through reproduction, public performance, rental or broadcasting. The moral right, that is the right to protect works from mutilation, distortion etc is also provided. • **Royalties** The Act provides for the collection of royalties for the owners of copyright works. Section 37 of the Act provides that the owner of copyright work is entitled to royalties for the public performance of copyright material or for the live performance.	• Even thoug the Act makes provision anti-piracy team, however, discussions with the representatives of the office indicated that the team has faced challenges in the performance of their activities. • Anti-piracy team requires more coordination to tackle the issue of piracy

Legislation	Observation	Some Weaknesses
	• **Copyright Offences** Any person who infringes on copyright provisions is liable to a criminal conviction which may include imprisonment of not more than three years. The one whose rights are infringed may also seek civil remedies. • **Collective Management Society** The Act provides for authors, producers, performers and publishers to form collective management societies to collect and distribute royalties. Such societies are to be formed based on the regulations. • **Monitoring Team** A Copyright Monitoring Team made up of police officers, representatives of authors and the Copyright Office is to be set up for the monitoring copyright, carrying out anti-piracy activities and monitor any copyright related issues.	
Copyright Regulations, 2010 (L.I. 1962)	The Regulations provide the framework for the implementation of the Copyright Act. Key provisions are discussed below: • **Registration of Copyright and Related Rights** This section if the LI provides the processes and procedures by which authors may deposit music or musical recording, register and be provided with a registration certificate. It also provides for the effective date from the registration of the work. • **Levy on Devices for Reproduction of Copyright Material** The Regulations allow for the imposition of a levy on devices for reproduction of copyright materials at a rate of 25%. The import tax is to discourage the unlawful reproduction of copyright materials in the country. Such levies are distributed to the bodies such as collection societies, Copyright Office and the Customs, Excise and Preventive Service. • **Formation of Collective Administrative Societies** The Regulations provide for the formation of collective societies for	• The Regulations do not expressly define the users of music who are liable to pay royalties.

Legislation	Observation	Some Weaknesses
	authors including music and music recording owners. A society is to apply for a license and be approved by the Minster for Justice and Attorney General's Department. A society is granted permit to operate for five years after which it may be renewed. • **Operation of Societies** The administrative set-up of a society is also provided in the regulations where it is expected to maintain offices and a register of members in the country. A society is also mandated to license users of musical works, charge appropriate royalties and to distribute royalties to its members.	
Electronic Communications Act 2008 (Act 775) **Electronic Communications Regulations**	• **Licensing of Radio Stations** The Act provides for the National Communications Authority (NCA) to license radio stations and to allocate frequencies	• The Act does not provide expressly for prospective applicant for licenses to have a logging system for the playing of music

Source: KPMG Analysis

8.2 Review of Policy Documents

This section reviews policy and strategy documents that have an impact on the music sector. These documents are the Ghana Shared Growth and Development Agenda (2010 – 2013), Cultural Policy, Creative Art Medium-Term Strategy, and the National Intellectual Property Policy and Strategy

Table 8.2.1 Review of policy documents

Policy	Observation	Some Weaknesses
Ghana Shared Growth and Development Agenda (2010 – 2013)	The Ghana Shared Growth Agenda (2010 – 2013) prepared by the National Development Planning Commission (NDPC) is reviewed below: • **Promotion of Creative Art Industry** The objective for the creative sector is to develop and strengthen Ghana's Creative economy in ways that would enable the nation to actively engage in the world trade in Creative goods and services. GSGDA identifies the creative arts as an industry within the private sector that is to be promoted. The plan identifies the following as some of the key challenges of the industry - weak institutional framework for the development of the industry, lack of access to long-term finance, weak enforcement of copyright laws, lack of an effective collection society and the absence of a council for the industry. • **Strategies to Promote Industry** The plan outlines a number of strategies to promote the industry. Key strategies that could impact the music sector include: ✓ Establishment of a council for the industry ✓ Facilitate the establishment of an appropriate and effective collection society ✓ Promote the establishment of Culture and Business Desks at Ghanaian Missions abroad ✓ Facilitate the establishment of a designated unit within the ministries, departments and agencies to facilitate the growth of the industry The strategies have a direct bearing on the music sector especially the establishment of the Council which is expected to develop policies and plans for the sector.	

Policy	Observation	Some Weaknesses
Culture Policy 2004	The Culture Policy has been developed to promote Ghanaian culture. • **Objective** One of the specific objectives of the policy is to promote arts by enhancing the status of artists and artistes, identifying, developing and rewarding creative talents and making artistic products contribute to wealth creation both for artistic individuals and the nation as a whole. • **Tax Reliefs** The policy provides that the Government shall enact laws to give tax relief to organizations and business concerns that make donations to and sponsor arts and cultural activities. • **Development of Music** The Policy has identified a number of strategies to develop the music sector. These are; ❖ The practice, creation and promotion of all forms of Ghanaian Music shall be encouraged by the State. ❖ Production of Musical instruments shall be encouraged, so that all schools and communities can own their own instruments. ❖ The State shall encourage private entrepreneurs to establish production plants and support activities to document, preserve, protect, publish and promote Ghanaian music.	• No provision for the development of infrastructure for the music sector • Policy has to be transformed into a well defined strategy to drive the creative art including music
Creative Sector Medium Term Strategic Development Plan (2012 – 2013)	The Creative Sector Medium-Term Strategic Plan has been developed based on the GSGDA. Some observations made include; • **Objectives** To harness, develop, promote and maximize the utilization of cultural assets and values to serve as the basis for the wealth creation and	• Lack of empirical data on the various domains to facilitate effective planning

Policy	Observation	Some Weaknesses
	socio-economic empowerment • **Action Plans** ❖ Effectively enforce and supervise laws and regulations pertaining to intellectual property rights. ❖ Develop and promote the implementation of programmes and activities that would increase awareness of intellectual property rights ❖ Facilitate access to finance and the export market for products of Ghanaian Creative Industry ❖ Facilitate the establishment of a council for the creative industry	
National Intellectual Property Policy and Strategy	The NIPPS has been developed by the Ministry of Trade and Industry in collaboration with the Ministry of Justice and Attorney General to ensure that the country's intellectual property regime is in line with best practice • **Vision** Exploit the intellectual property for accelerated growth in technological and industrial development in Ghana. To this end the following strategies have been identified as having a direct bearing on the music industry • **Programmes/Projects** ❖ *Review and amend existing laws on IP to meet TRIPs requirements and emerging trends and best practices* The review of the Copyright Act is one of the activities to be initiated under this strategy. This presents an opportunity for the Act to address issues relating to internet transactions so that rights of authors could be protected. ❖ *Establish a National Intellectual Property Office* This is aimed at centralizing the various categories of IP within one office to ensure harmonization	

Policy	Observation	Some Weaknesses
	❖ *Establish a Centre for Creative Industries* One of the projects earmarked under the policy aimed at promoting creativity and innovation is the proposed Centre for Creative Industries. This has to be harmonized with the proposed Creative Council Arts Council to ensure that the roles are clearly defined.	

Source: KPMG Analysis

9 Economic Value Analysis

9.1 Introduction

This section presents the analysis of the size and value of the music industry in Ghana. It first presents the size of the sector in terms of the number of people employed along the value chain. This section further presents a theoretical framework for the determination of the income generated from the sector. It then estimates the revenue generated from the identified sources and the contribution of the local sector economy. Finally, the section also attempts to estimate the revenue loss due to the activities of pirates.

9.2 Employment Characteristics

9.2.1 Size of the Sector

Table 9.2.1 presents the size of the music sector measured by the number of people employed. Employment is measured as fulltime of part-time.

Table 9.2.1 Size of sector

Category	Profession	Employment		
		Fulltime	Part-time	Total
Creators	• Performers/composers	2,240	1,760	**4,000**
	• Traditional Folkloric	N/A	N/A	**6,060**
	• State Security Services (Ghana Armed Forces, Police, Immigration, CEPS and Fire Service)	1,453	N/A	**1,453**
	• Brass Band	N/A	N/A	**1,050**
	• Concert Party	N/A	N/A	**240**
Business	• Producers/publishers/record labels • Supporting staff (3 staff per producer)	172 516	44 132	**216** **648**
	• Studio operators/Managers • Supporting staff	N/A	N/A	**250** **1,250**
	• Artiste managers	16	10	**26**
	• Manufacturers (local instrument producers	1,170	80	**1,250**
	• Manufacturers (CD production) • Supporting staff	N/A	N/A	**11** **55**
Sale and marketing	• Spinners • Supporting staff (2 staff per spinner)	1,356 2,712	1,469 2,938	**2,825** **5,650**
	• Distributors & retailers (including mobile vans)	4,100	900	**5,000**
Total		**12,282**	**7,333**	**29,984**

Source: KPMG Analysis; N/A means data is not available for the categorisation of professionals into part-time and full-time.

Creators Category

A. Performers/Composers

According to MUSIGA, there are about 2,000 members, half of whom are active. Based on this we also estimate the same number of musicians who are not members of the Union but operate in the industry as performers or composers. We therefore estimate the number of professional musicians to be about 4,000 as operating in the commercial segment of the market. This therefore excludes traditional folkloric groups, choirs etc who are generally not commercialising their music.

B. Traditional Folkloric

These are traditional and neo-traditional type groups that, to varying degrees, operate in the modern sector, that is, play for money, play on stage, play at hotels and beach resorts, at national or international festivals, appear on records or film, are of interest to tourists, have formed unions or associations, and are involved with regional centres for National Culture. We estimate that about 404 groups fall in this category where they operate within the commercial segment. Our sample of traditional groups revealed an average number of 15 resulting in a total number of 6,060.

C. State Security Services[12]

The state security services made up of the Ghana Armed Forces, Police Service, Immigration Service, Customs Excise and Preventive Service (CEPS) and Fire Service employ musicians either as composers, directors or performers. Interviews with some of the directors in the service revealed a total of 1,452 (Amo, 2013), (Hupkorti, 2013), (Arko, 2013) and (Ebonyi, 2013).

D. Brass Band

It is estimated that there are about 70 bands with a significant proportion of them located in the Central and Western regions each with an average membership of 15. The total number of musicians within this sub-category is estimated to be 1,050.

E. Concert Party

Concert parties do not generally belong to MUSIGA. In Accra there is a small Concert Party Union, plus members of the Cantata and other TV shows as well as the concert performers who feature at the Keysoap National Theatre Program (150 artists). Also there are around 6 concert parties (membership 15 each) still operating mainly in the Ashanti Region with a total of 90 artists. We therefore estimate a total membership of 240.

Business Category

A. Producers

The membership list obtained from GAPI showed a total of membership of 142. Our discussions with industry experts and other bodies indicated an additional 74 producers who were not members of GAPI. The study revealed that producers have an average of three supporting staff which we also estimate to be 648. Results of our sample of producers showed that 80% work as fulltime and the rest on a part-time basis.

B. Studio Operators

Interviews with sound engineers revealed about 250 studios with over 200 concentrated in Accra. However, a few are equipped with the logistics to meet the needs of modern recording. We estimate an average supporting staff of 5 bringing total employment in recording studios to 1,500.

C. Artiste Managers

Our interviews showed a total of 26 artiste managers in the sector with 60% working as fulltime and the rest as part-time.

[12] The Ghana Immigration Service has 2 regiments and 1 dance band with a total number of 70 musicians. The Ghana Police has three Central and 9 regional bands making a total of 592. The Ghana Armed Forces have 14 regimental & dance bands with a total of 600 personnel. CEPS has1 dance band with 18 members and Fire Service 6 dance bands with 173 members. This does not however, include members of the Prisons band.

D. Local Instrument Manufacturers

These are the total number of indigenous instrument manufacturers based on discussions with the Greater Accra Wood Carvers Association. Total number is estimated to be 1,250 with most concentrated in Accra and Ashanti regions. Over, 90% are estimated to be working as fulltime and the rest as part-time.

E. Audio Manufacturers

These are made up of entities engaged in the duplication of CDs and cassettes. Data obtained from the Copyright office showed about 11 entities in the country with 5 supporting staff each.

Marketing and Distribution

A. Spinners

MUSIGA estimates the total number of spinners to be 2,825 with 48% estimated to be working as fulltime. Interviews revealed that spinners have an average of two supporting staff hence total estimated supporting staff is in the region of 5,650.

B. Distributors/Retailers

These are made up of individual and corporate entities (including hawkers and mobile vans) estimated to be 5,000. The sample of respondents revealed that 84% operate on a fulltime basis.

9.2.2 Characteristics of Employment

Creators

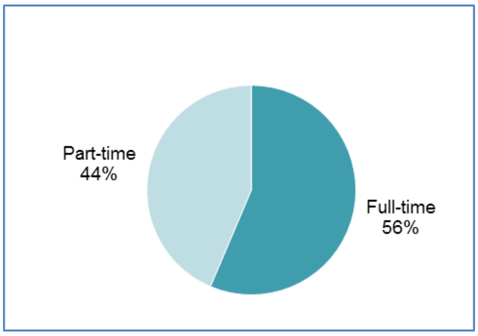
This comprises lyricists, performers, composers, singers, instrumentalists and club DJs. The following presents the employment characteristics of this category.

- *Employment Status*

Majority (56%) of musicians are full-time professionals earning income from music composition and performance. The rest are part-time professionals with other primary sources of income.

Part-time musicians are involved fully in other professional jobs including trading and only perform as a hobby.

Figure 9.2.1 Employment status of creators



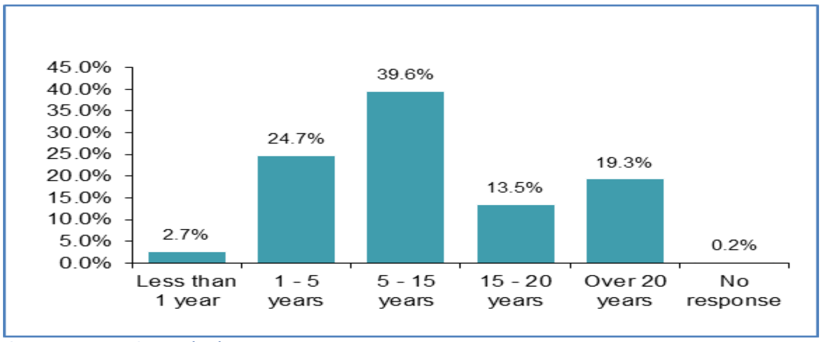
Source: KPMG Analysis

- *Length of Employment*

On the issue of length of working period, a greater proportion has more than 5 years experience, with 39.6% having between 5 and 15 years of experience.

Musicians with more than 20 years experience represented 19.3% of the sample.

Figure 9.2.2 Length of employment of creators

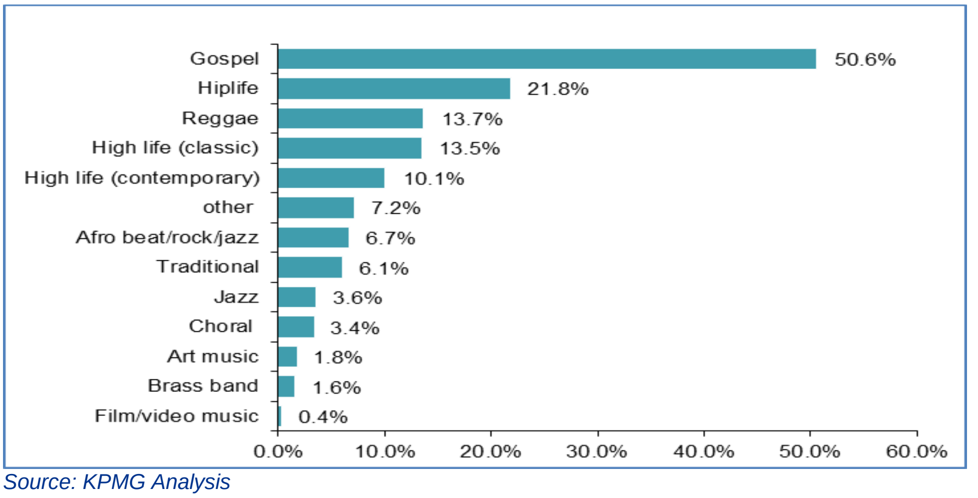


Source: KPMG Analysis

- *Genres*

Figure 9.2.3 presents the categories of music genre produced. More than half of musicians create the gospel music which highlights the rapid growth in the gospel genre. The greater proportion may be due to the increased demand for the genre. Hip-life followed with 21.8% as the second most created genre with reggae occupying the third position. Film/video music is the least created genre.

Figure 9.2.3 Type of musical genre that is created

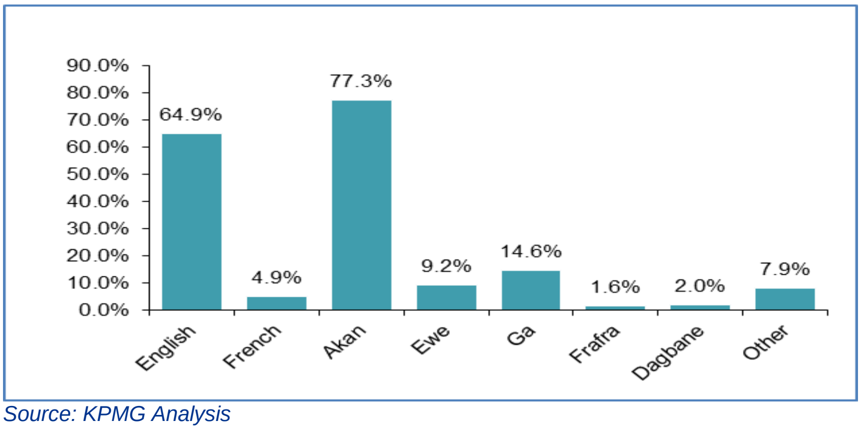


Source: KPMG Analysis

- *Language*

Two major languages, Akan and English, are the most used by Ghanaian musicians. The Akan language was used in 77.3% of music created, followed by English with 64.9 % (Figure 9.2.4). Ga and Ewe are the other two important languages used by musicians with 14.6% and 9.2% respectively. Other notable languages are French (4.9%), Dagbane (2.0%) and Frafra (1.6%). Others include Gonja and Nzema.

Figure 9.2.4 Language used by musicians

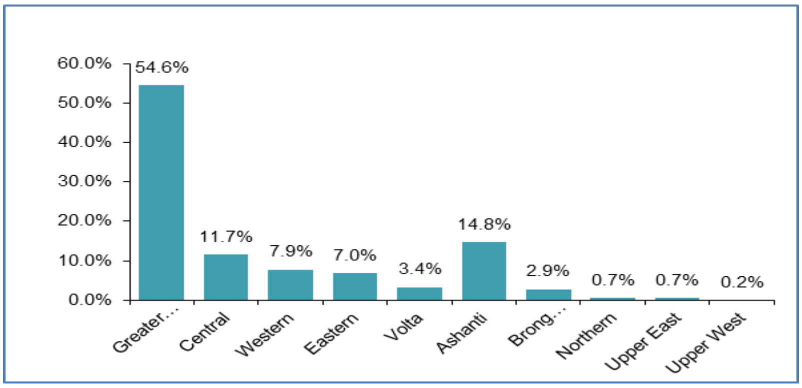


Source: KPMG Analysis

- *Geographical Distribution*

Majority of the musicians, constituting 54.6%, ply their trade in the Greater Accra Region (Figure 9.2.5). This may be explained by the level of business and commercial development in the Region. The Ashanti Region follows with 14.8% of musicians. This seems quite low given the location and the history of the region and its political significance. The Central Region accounts for 11.7% followed by the Western with 7.9%.

Figure 9.2.5 Region of operation - musicians

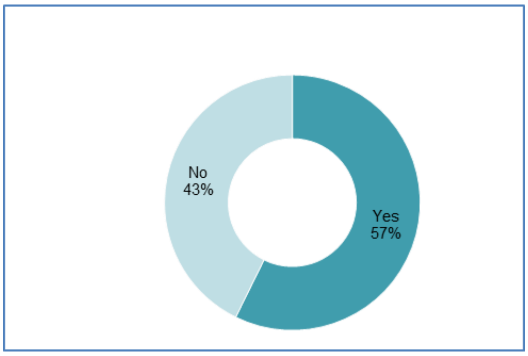


Source: KPMG Analysis

- *Teaching of Music*

The study probed into the issue of how many musicians also teach music as part of their profession. As shown in Figure 9.2.6, more than half of the sample answered that music teaching is part of their profession. This supports the opinion expressed about the availability of teachers for the music discipline.

Figure 9.2.6 Percentage of musicians who also teach music



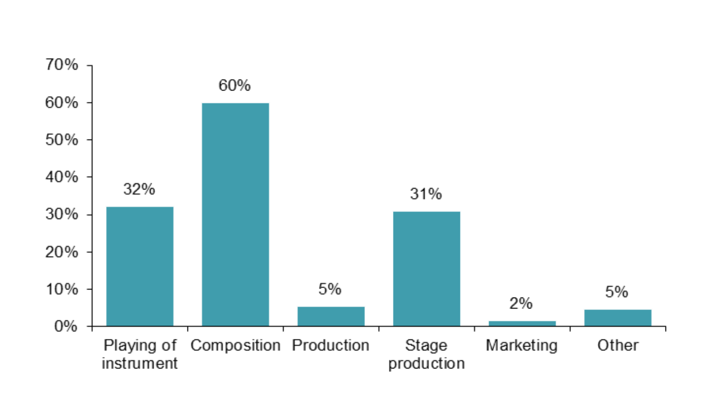
Source: KPMG Analysis

- *Teaching specialization*

The study also identified the areas of specialization for the musicians who teach as part of their profession. Out of the 255 respondents, 60% specialize in the teaching of music composition (Figure 9.2.7). Playing of instruments and stage production recorded 32% and 31% respectively.

Interestingly, there is limited specialization in the teaching of the business side of music, such as production (5%) and marketing (2%).

Figure 9.2.7 Teaching areas of musicians who are music teachers



Source: KPMG Analysis

- *Song composition and recording*

On the average a musician has 3 albums to his or her credit with a maximum of 50 albums. The study found that 12.8% have not produced any album due to factors such as limited access to finance. The average number of songs composed and recorded annually is 22 and 9 respectively. The study found out that about 5% of musicians have not composed or recorded any song in their career. The results also show that less than half of songs composed are recorded in the year.

Table 9.2.2 Details of song composition and recordings

	Number of albums	Annual composition	Annual recording
Mean	3	22	9
Minimum	0	0	0
Maximum	50	365	100

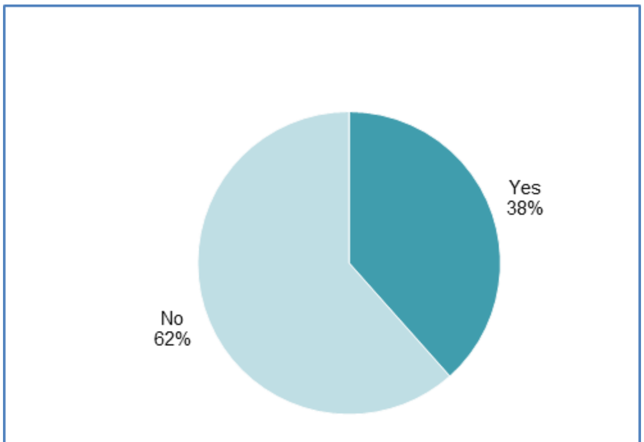
Source: KPMG Analysis

- *Ownership of Instruments*

Ownership of musical instruments is vital to the development of the industry. Figures 9.2.8 and 9.2.9 present the proportion of musicians owning instruments and the sources for those who do not own instruments.

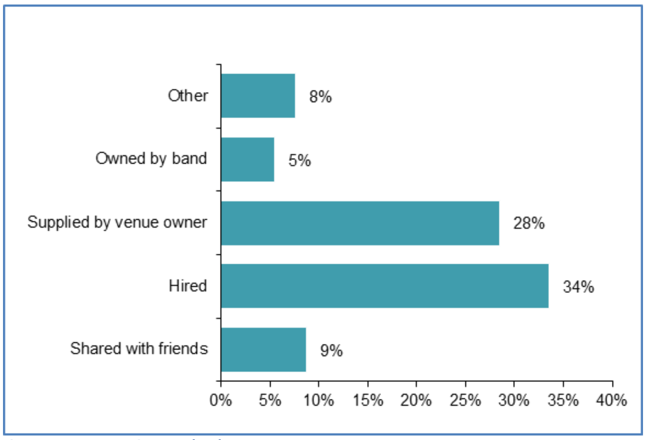
A little over one-third of musicians own instruments. The reasons include the high cost of instruments and the lack of support in the form of finance.

Figure 9.2.8 Ownership of musical instruments



Source: KPMG Analysis

Figure 9.2.9 Details of instrument ownership



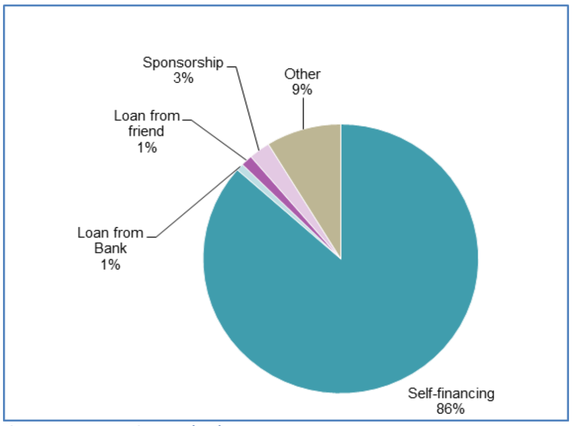
Source: KPMG Analysis

Majority of musicians representing 62% do not own instruments. Out of this number 34% hire instruments for their musical works, 28% obtain them from venue operators such as churches and clubs and the rest have access through friends or their membership of bands.

- *Source of Finance*

Finance has been mentioned as the most important challenge in the industry. The results revealed that musicians finance 86% of their expenditure from personal sources. Bank loan and loan from friends constitute 1% each. Sponsorship from corporate entities accounts for 3% of finance sources while the other sources include family, producers, managers and other donors.

Figure 9.2.8 Sources of finance



Source: KPMG Analysis

Business Category

Within the business category, we have identified the following subcategories, producers/publishers/record labels, studio managers/operators, artiste managers, manufacturers and event organizers. The employment characteristics are discussed below.

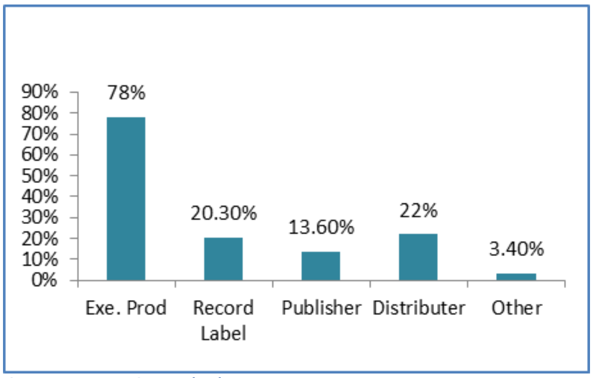
A. Producers/Publishers/Record Labels

- *Area of Specialization*

The nature of music production in Ghana shows that producers perform a number of functions. While some are specialized in producing others have multiple roles as publishers and record labels.

Executive producers constitute 78% implying that their focus is purely on providing finance for production. The absence of specialist entities in record label and publishing has resulted in the multiple roles. 20.3% and 13.6% perform the function of record labels and publishers respectively. Some respondents also perform additional function of distribution constituting 22%.

Figure 9.2.9 Areas of specialization

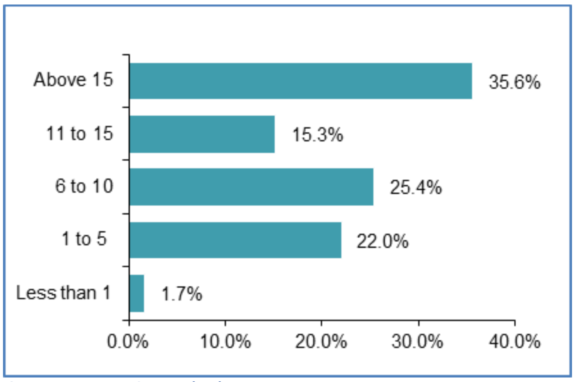


Source: KPMG Analysis

- *Status and Length of Employment*

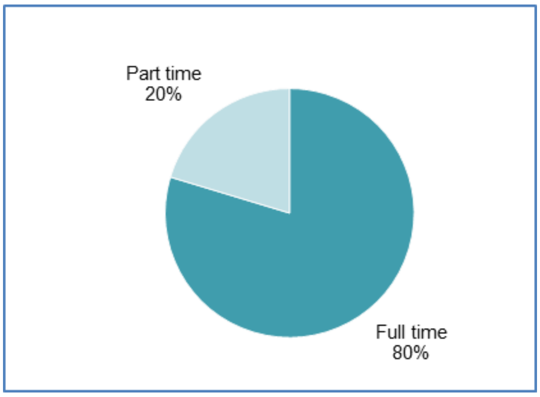
A significant proportion of producers representing 80% are full-time workers with the remaining being part-time. This indicates that the industry has a potential with a vital part of the value chain with full concentration on the production.

Figure 9.2.10 Years of business operations



Source: KPMG Analysis

Figure 9.2.11 Status of employment



Source: KPMG Analysis

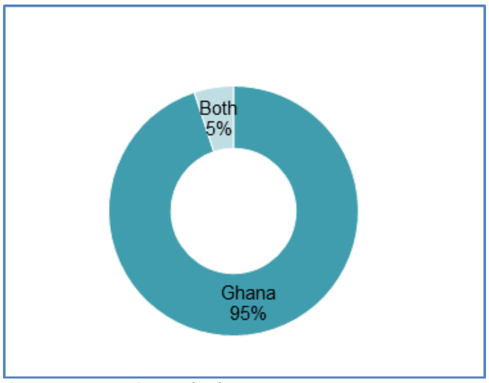
In terms of period of experience, over 50% have been in music production for more than 10 yearswhilst 35.6% have more than 15 years of experience.

- *Regional Distribution*

Asked whether they operate from Ghana and or abroad, 95% answered they operate solely in Ghana with 5% responding that they operate from both Ghana abroad. Reasons for operating abroad include the existence of modern technology for music production.

As expected, majority of producers (59.3%) operate from the Greater Accra Region. This is followed closely by the Ashanti Region with 45.8%. This also corroborates the finding for the musicians which depicted a similar pattern.

Figure 9.2.12 Region of business operations



Source: KPMG Analysis

- *Regional Distribution of Sales*

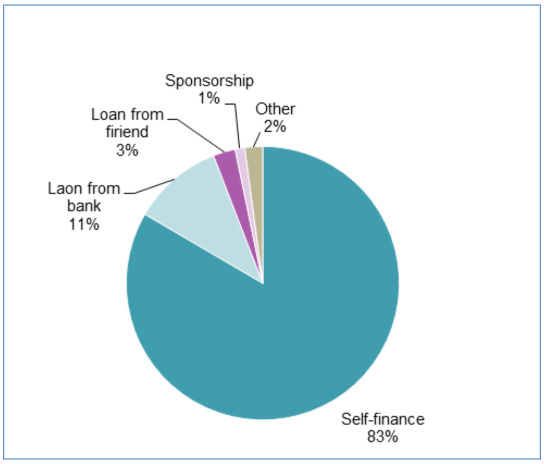
For sales recorded by producers in Ghana, Greater Region accounted for largest proportion with 41%.
The Ashanti Region followed with 37% of sales while Volta Region placed third with 9%. This supports the concentration of activities in the two regions.

- *Sources of Finance*

The major source of finance for producers is personal funds representing 83% of total funds. Some producers obtained funding from the bank which represented 11% of the total funding. This though is insignificant as the bulk of the funding is from personal funds.

Loan from friend and sponsorship constituted 3% and 1% respectively. Other sources funds include family and Susu rotating credit group.

Figure 9.2.13 Sources of finance



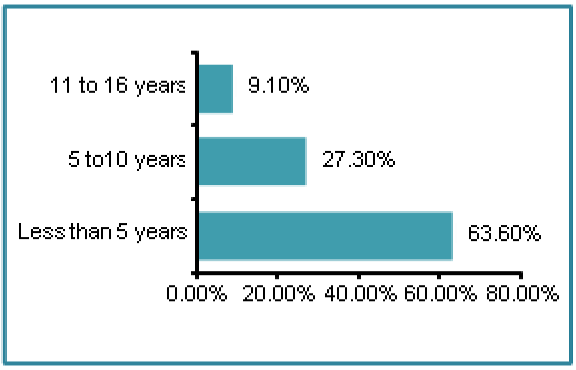
Source: KPMG Analysis

B. Artiste Managers

- *Duration of operations*

From the responses, a few of the respondents have been in the business for a long time. About 9.1% have been in the business for 11-16 years. Those who have been in the business between 5-10 years were about 27.3%. Lastly, 63.6% of the respondents formed those who have been in the business for less than 5 years. This could be as a result of the recent realization of the business as a lucrative venture.

Figure 9.2.14 Years of business operations

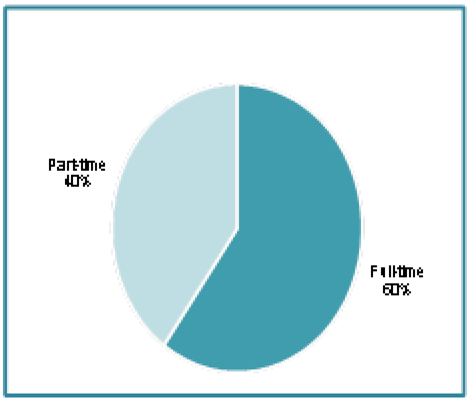


Source: KPMG Analysis

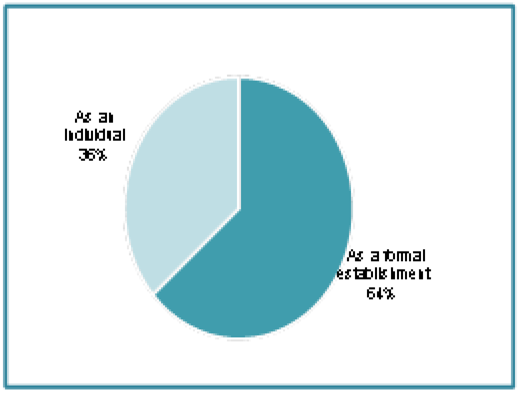
- *Professional status and mode of operation*

The analysis identified 60% artiste managers operate on full-time basis whiles the rest are on part-time basis. About 64% of them run the business as a formal establishment with a recognized office whereas the rest of the 36% are running their businesses as individuals or freelancers with no formal establishment.

Figure 9.2.15 Professional status and mode of business operations



Source: KPMG Analysis

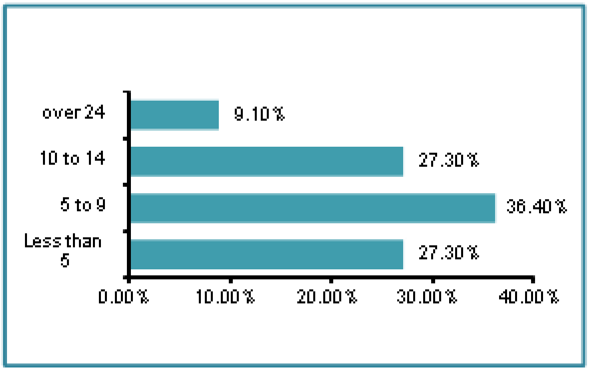


Source: KPMG Analysis

- *Ghanaian artistes under management*

From the responses received interviewees, it was realized that majority of the artistes who were managed were of Ghanaian origin. Two (2) respondents although admitted to the fact that they manage less than 5 artiste who are of other African descent. Also, 36.4% of the respondents manage 5-9 artistes, the rest who manage less than 5 artistes and 10 - 14 artistes recorded the same percentage (27.3%). About 9.1% manage over 24 artistes.

Figure 9.2.16 Number of Ghanaian artistes who are under management

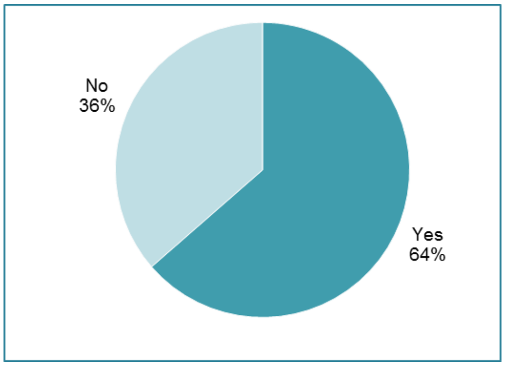


Source: KPMG Analysis

- *Artiste training*

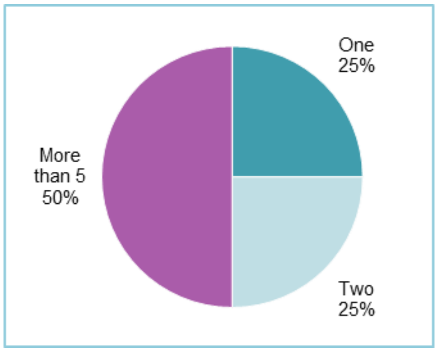
From the responses, 64% of the respondents admitted to assisting their artistes with some form of training. Out of this 64%, 25% organised an average of 1 training program within the year, 25% organised an average of 2 training programs within the year and 50% organised more than 5 training programs within the year. Apart from trainings, some of the artiste managers lobby for their artistes to perform during events. Figure 9.2.19 presents artiste trainings, average number of trainings within the year and the types of events organized by some of the managers.

Figure 9.2.17 Artiste Manager's who provide training for their artistes



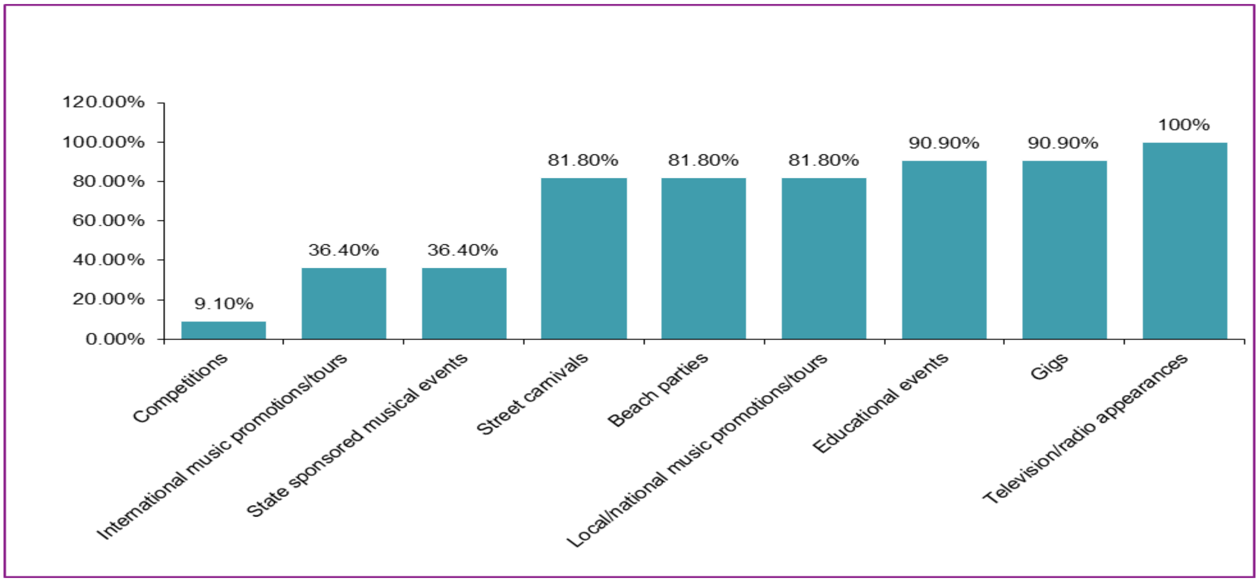
Source: KPMG Analysis

Figure 9.2.18 Number of artiste trainings



Source: KPMG Analysis

Figure 9.2.19 Types of shows organised

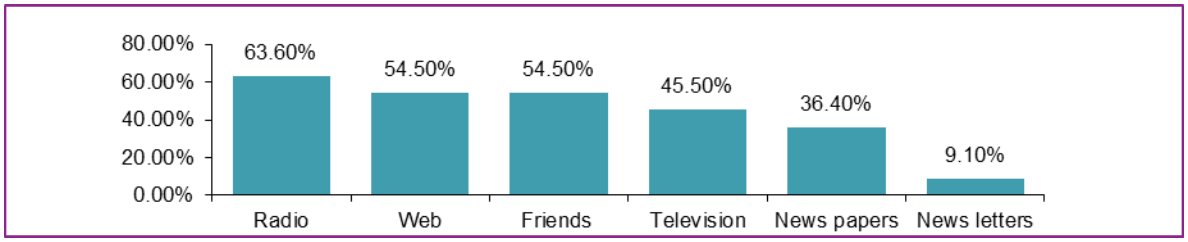


Source: KPMG Analysis

- *Identifying events*

Concerning how they identify events in order to lobby for their artistes, the following mediums account for different percentages. Radio constitutes 63.6%, the web and information from friends constitutes 54.5% respectively. Followed by the television which accounts for 45.5%, news papers and newsletters constitutes 36.4% and 9.1% respectively as shown in the chart below.

Figure 9.2.20 How Artiste Managers identify events

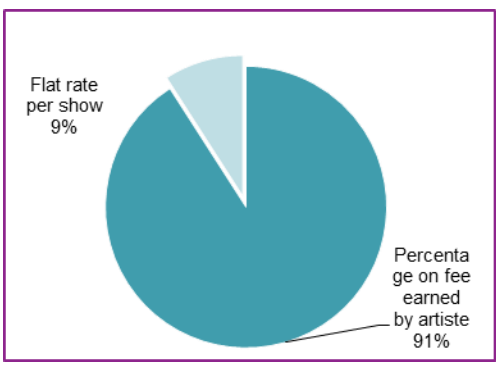


Source: KPMG Analysis

- *Fee arrangement*

Fee arrangements between Artiste Managers and Artistes are arranged between both parties, either as a flat rate per show or on a percentage of the fee earned by the artist per show. The flat rate per show is rather unpopular within the Ghanaian music industry as only 9% of respondents practice that. 91% of respondents charge a percentage of the fee the artists earns per show. When an artiste earns more the manager earns more, if the artiste earns less, same applies. This is more popular because of the cushion it presents to both the artiste and manager. In events that you earn a small amount as an artiste below a prearranged fee, you are forced to pay more to the manager than you have earned. As such the artiste will lose out. When the artiste earns far more than the prearranged fee, the manager loses out.

Figure 9.2.21 How fees are arranged between Artistes and their Managers

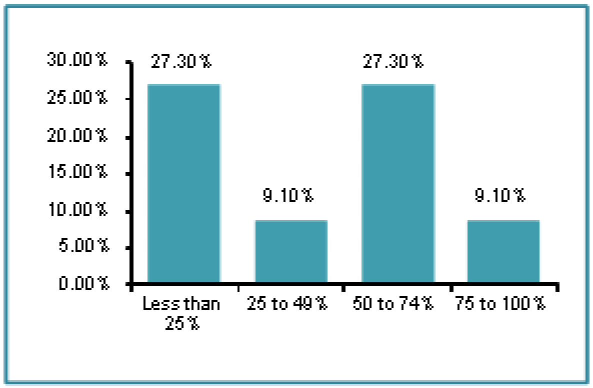


Source: KPMG Analysis

- *Other sources of income*

About 72.7% admit to have other sources of income aside what they get from artiste management. They then indicated what proportion of their income comes from the job. About 27.3% admit that less than 25% of their income is from this venture. The same applies to those who get 50%-74% of their income from artiste management. The rest who get up to 25%-49% and 75%-100% from artiste management constitute about 9.1% respectively.

Figure 9.2.22 Percentage of income from managing Artistes



Source: KPMG Analysis

Sale and Marketing Category

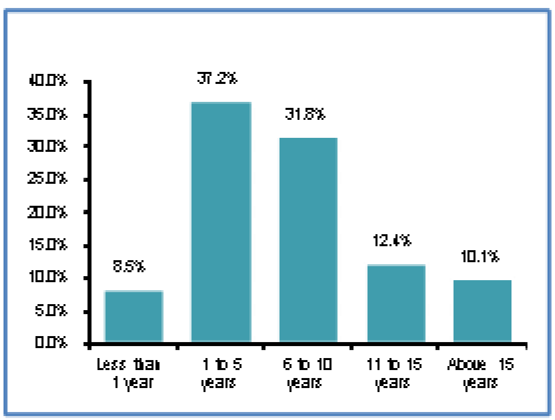
A. Spinners

- *Length of Employment*

Spinners who have experience between one and five years represent 37.2% of the respondents. Quite a significant proportion of respondents have over six years experience working as spinners.

The long period of experience could be explained by the status of employment as a majority operate on a part-time basis.

Figure 9.2.23 Duration of business operations - Spinners

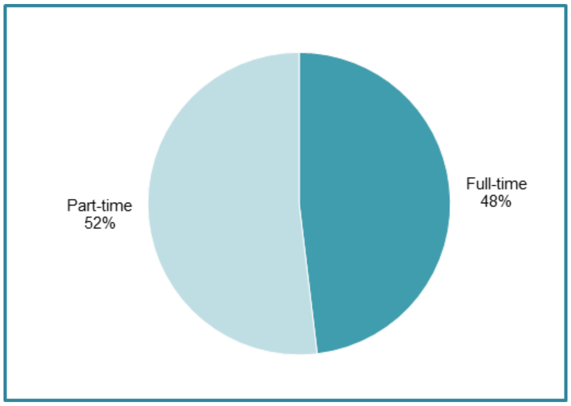


Source: KPMG Analysis

- *Status of Profession*

Majority of spinners operate as part-time workers earning income from other sources. This may be explained by the nature of events that attract spinners. Most of these events are organized during weekends. This also implies that spinners can be engaged in their fulltime business and also operate during the weekends.

Figure 9.2.24 Status of employment



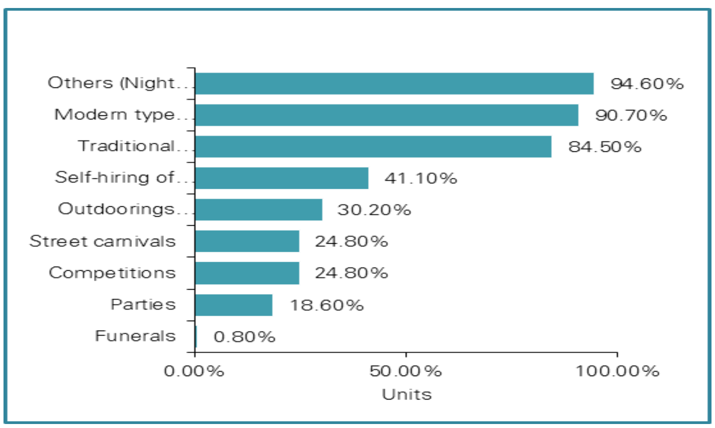
Source: KPMG Analysis

- *Types of Events*

Funerals remain the major event attracting the services of spinners recording 94.6%. Parties including engagements are the second most patronized by spinners representing 90.7%. Outdoorings and naming ceremonies recorded 84.5%.

The results also corroborate the fact that spinners operate during weekends as almost all of these events are organized during this time.

Figure 9.2.25 Types of shows Spinners spin under

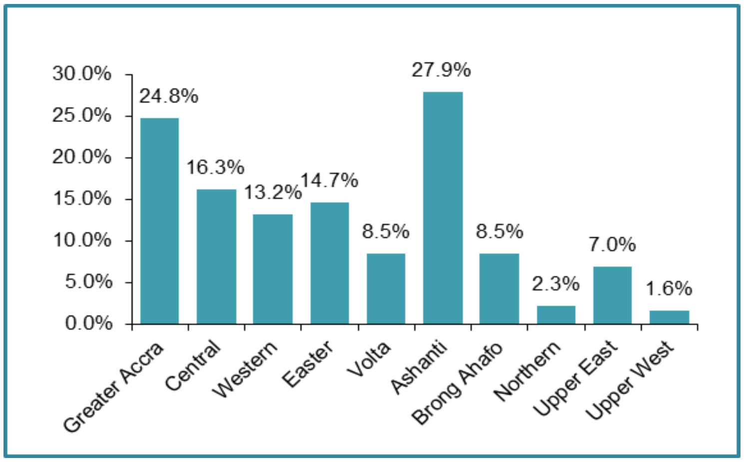


Source: KPMG Analysis

Table 9.2.3 Regional Distribution

Ashanti Region recorded the highest number of spinners operating in the country with 27.9% of them answering that they operate from that region. Greater Accra and Central regions followed with 24.8% and 16.3% respectively. These regions are known to have a lot of the traditional events including funerals and outdoorings.

Figure 9.2.26 Region of business operations

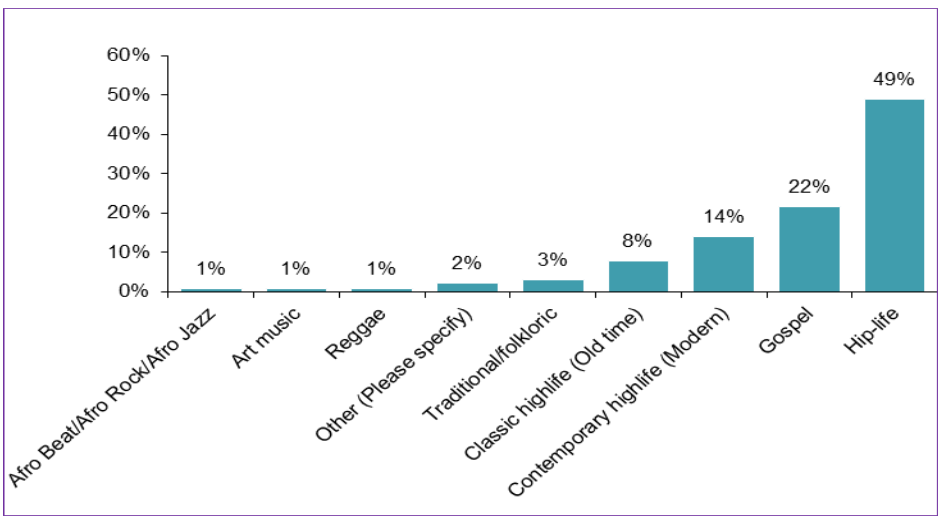


Source: KPMG Analysis

- *Characteristics of Music Played*

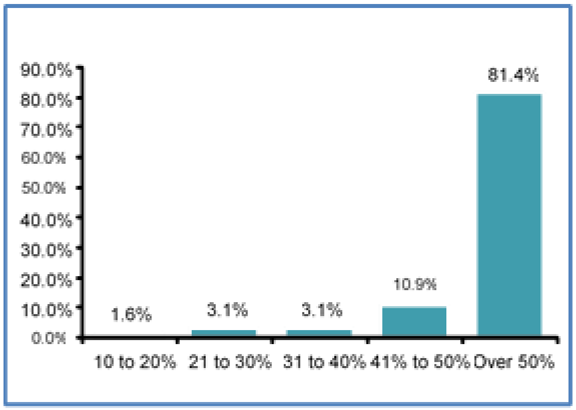
The following diagrams present the features of music played by spinners.

Figure 9.2.27 Musical genres that Spinners play



Source: KPMG Analysis

Figure 9.2.28 Percentage of Ghanaian music played by Spinners



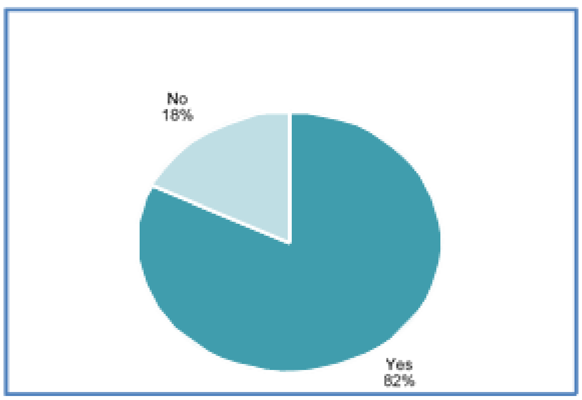
Source: KPMG Analysis

Over 81.4% of spinners answered that Ghanaian music constitutes over 50% of the type of music they play. This is expected as most of these functions are traditional in nature and are patronized by adults and the elderly. On the type of genre played, 48.8% of spinners were of the view that hip-life is the most played at these functions. This is shows the patronage of the youth who are the main users of the genre. Gospel genre followed with 21.7% with contemporary highlife occupying third position with 14.0%.

- *Ownership of Logistics*

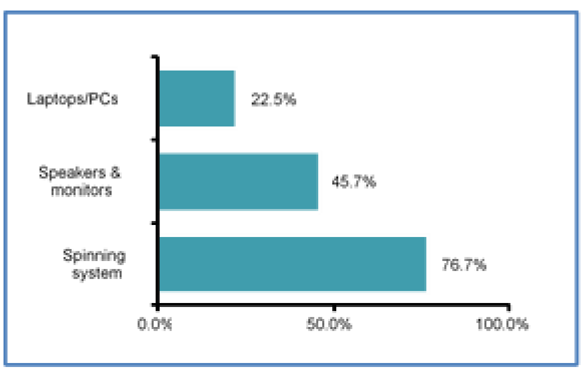
Figure 9.2.31 describe the percentage of spinners who own logistics and the type of instruments.

Figure 9.2.29 Percentage of Spinners who own logistics



Source: KPMG Analysis

Figure 9.2.30 Types of logistics owned



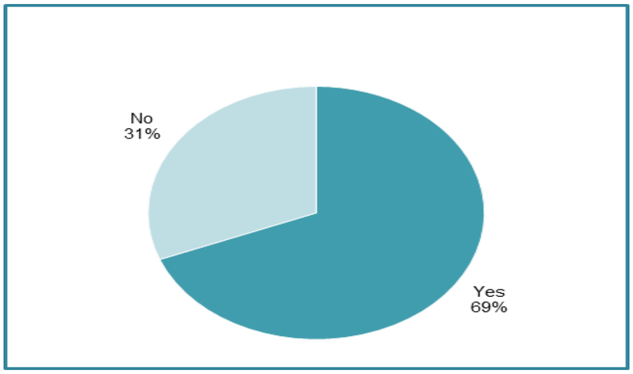
Source: KPMG Analysis

Majority (82%) of spinners own their instruments with the rest hiring them from other instrument providers. Over three-quarters (76.7%) of spinners own spinning system, 45.7% own speakers and monitors and 22.5% own laptops or personal computers used for storing songs.

- *License and Payment of Royalties*

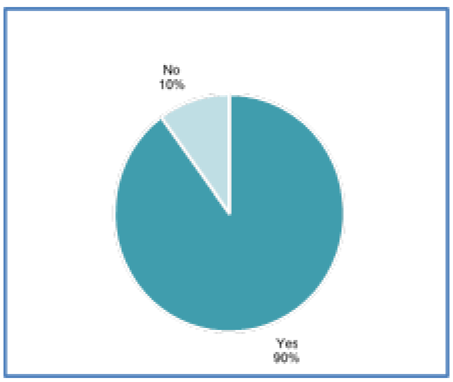
Figures 9.2.33 and 9.2.34 present the proportion of spinners who have obtained licence from GHAMRO and those who pay royalties.

Figure 9.2.31 Percentage of Spinners who are licensed by GHAMRO



Source: KPMG Analysis

Figure 9.2.32 Percentage of Spinners who pay royalties



Source: KPMG Analysis

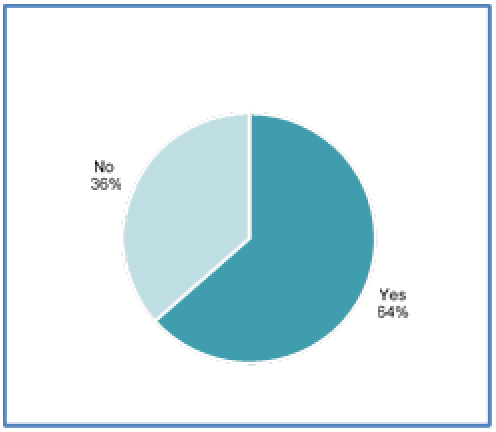
A larger proportion (77%) of the respondents have obtained licence from GHAMRO while 23% who have not obtained licence gave reasons such as the "cumbersome process of getting it", "do not know they have to get a license" and "also where to get it from". Out of those who have obtained licence from GHAMRO, 10% do not pay royalties. They explained that they "do not know royalties have to be paid", "do not know who to pay to" or "do not know where to pay royalties".

- *Other Sources of Income*

The nature of the operation of spinners implies they are mainly busy in the weekend. Figure 9.2.35 depicts the other sources of income. A greater proportion of respondents representing 64% have other sources of income. These sources include trading, driving and other trades. Some have these as the major income earning sources.

The remaining 36% do not have any other sources of income. This implies that their entire livelihood depends solely on income from spinning.

Figure 9.2.33 Proportion of Spinners who have other sources of income



Source: KPMG Analysis

- *Membership of Associations*

There are a variety of bodies or associations for spinners. However, there is no centralized organization of these professionals and are organized in various groups. Close to two-thirds belong to one form of association or the other. These bodies include the PROMAG, GHAMRO and regional spinners associations. The lack of an organized body is likely to make it difficult for them to be sensitized on copyright laws and their responsibilities. It may also serve as a communication barrier since they it will be difficult for them to be address or to deliver an address.

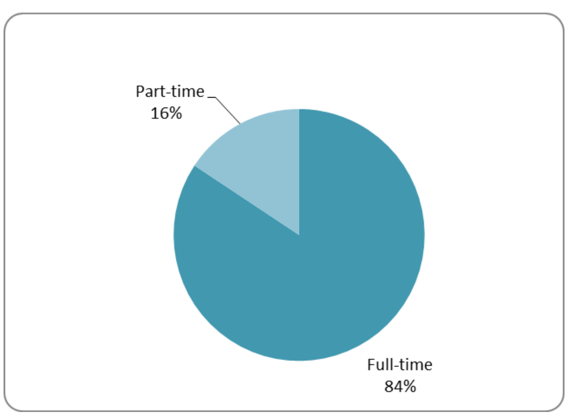
Distributors/Cassette Retailers

This section presents a discussion on the distributors and retailers of music products. Distributors of products also perform a dual role as retailers therefore a combined analysis has been done.

- *Business Status*

Distributors mostly work on full-time basis, thus they are solely into the retail of CDs with only about 16% of them working on part-time bases.

Figure 9.2.34 Status of business operations

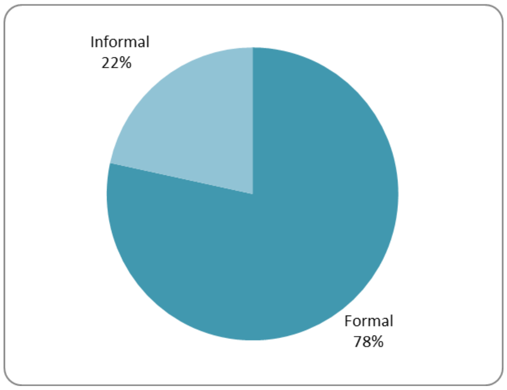


Source: KPMG Analysis

- *Nature of Operation*

Most of these distributors (78%) operate as formal entities with a registered business. 22% also operate informally.

Figure 9.2.35 Nature of business operations

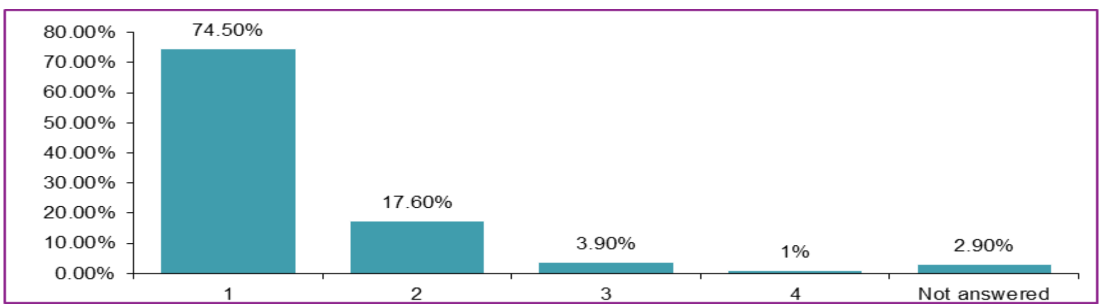


Source: KPMG Analysis

- *Base of operations and number of outlets*

The base of operations of the distributors was found to be mainly in Ghana (98% of distributors). Out of the number of distributors who are located in Ghana, 74.5% of them have one outlet, 17.6% of them have 2 outlets and 3.9% of them have 3 outlets. The highest number of outlets owned by a distributor was 4 and only 1% of the respondents had that number. 2.9% of distributors did not respond to this question. This is indicated in Figure 9.2.38.

Figure 9.2.36 Number of distribution outlets per Distributor

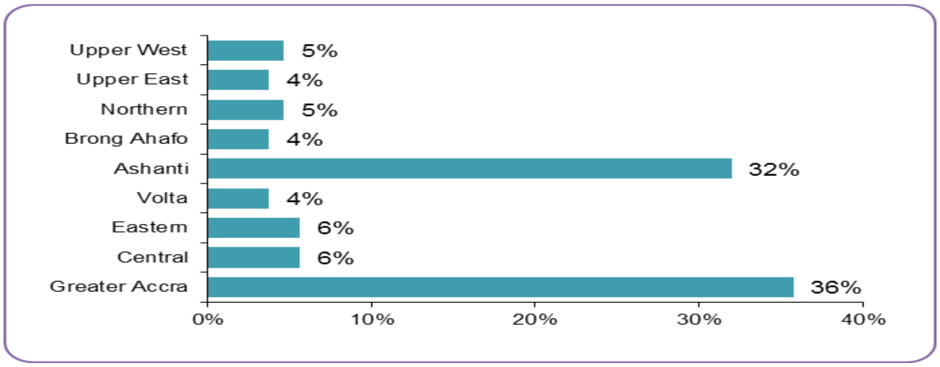


Source: KPMG Analysis

- *Region of operation*

We found out that, 37.3% of distributors operate from the Greater Accra region followed by the Ashanti region which has 33.3% of distributor operations. The Volta, Brong Ahafo and Upper East regions have the least number of distributors of only 3.9%.

Figure 9.2.37 Region of business operation

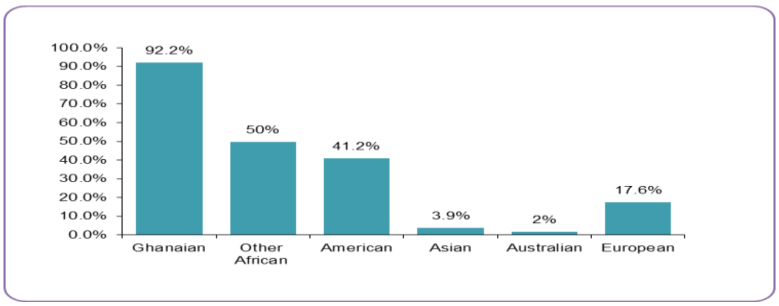


Source: KPMG Analysis

- *Kinds of music being distributed*

They distribute Ghanaian, other African, America, Asian, Australian and European music. Out of the total number of distributors we interviewed, 92.2% of them distribute Ghanaian music. 50% distribute other African music, 41.2% distribute American music followed by 17.6% of them that distribute European music. Asian and Australian music is distributed by a smaller proportion of distributors constituting 3.9% and 2% respectively.

Figure 9.2.38 Kinds of music being distributed

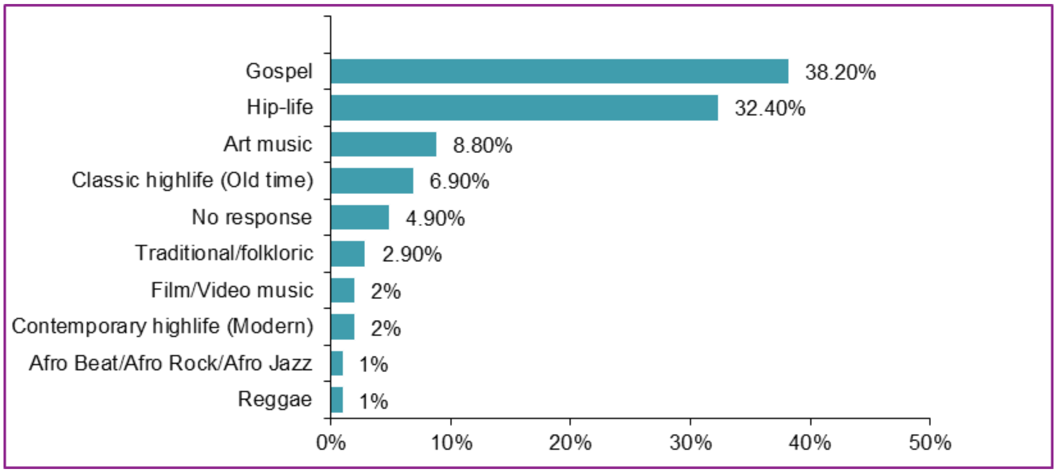


Source: KPMG Analysis

- *Distribution of music genres*

Among the genres, Gospel music is distributed easiest, followed by hip-life representing 38.2% and 32.4% respectively. Reggae and Afro Beat are the most difficult music genres to distribute. They represent 1% each.

Figure 9.2.39 Musical genres that are distributed easier



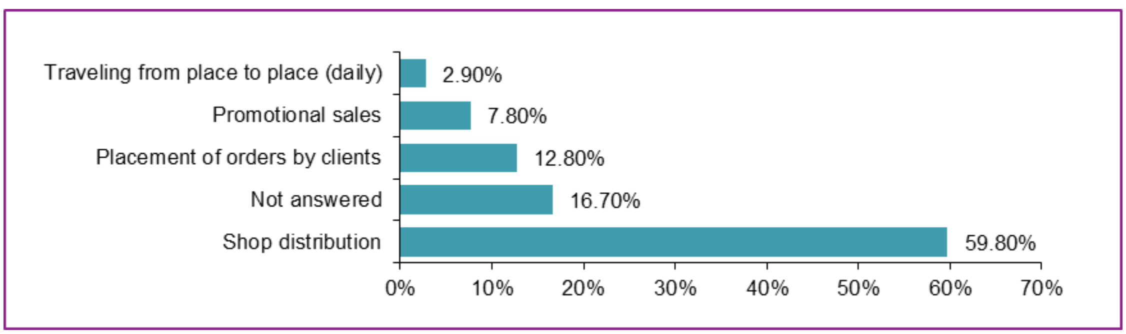
Source: KPMG Analysis

- *Distribution methods*

Ghanaian distributors distribute music/sound carriers mainly by selling in their shops. This could be office spaces, kiosks, table tops or on shelves. 59.8% of distributors adopt this method. Surprisingly, 16.7% of respondents did not answer this question. 12.8% of respondents indicated that, placement of orders by clients is one of the methods they use in music distribution. 7.8% adopt promotional sales which takes various tailor made approaches. The smaller percentage (2.9%) use mobile vans to travel from place to place on a daily basis. Absolutely no respondent indicated online/digital platforms as distribution method.

We did not identify any Ghanaian digital music platforms that were into the sale of Ghanaian music. The existing platforms in Ghana are for music and artiste promotions and as such not for music or music product sales. Users have access to download music for free and to read news about the industry as well. 'www.ghanamotion.com' is one such platform used by Ghanaian artistes and their management for promotional purposes.

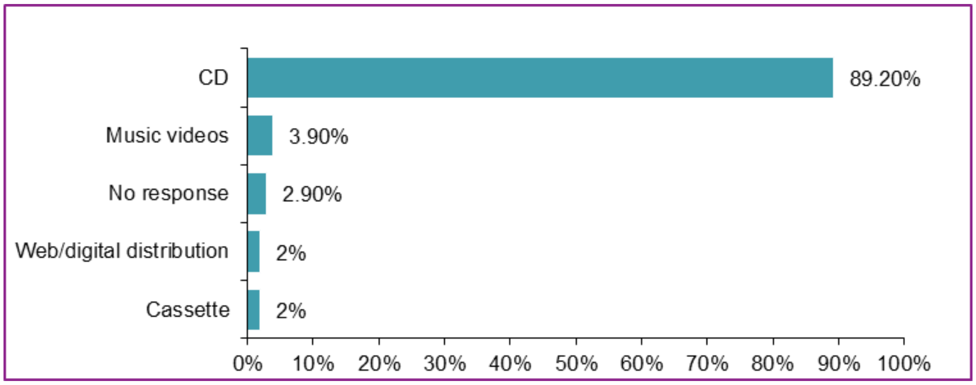
Figure 9.2.40 Distribution methods



Source: KPMG Analysis

It was observed that CDs were distributed more easily by distributors followed by music videos, representing 89.2% and 3.9% respectively. 2.9% did not respond to this question and 2% responded to web/digital distribution and cassettes respectively.

Figure 9.2.41 Music product distributed more easily

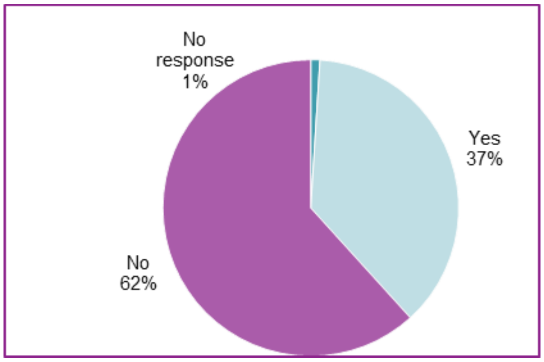


Source: KPMG Analysis

- *Attendance to events*

Largely, distributors do not attend any music/artiste promotion events (62%); a smaller percentage rather attends such events.

Figure 9.2.42 Attendance of musical/artiste promotion events

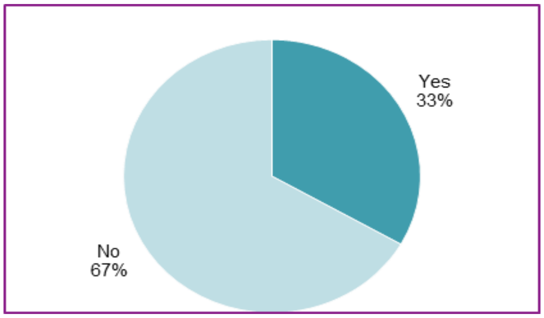


Source: KPMG Analysis

- *Other sources of income*

Most distributors have no other source of income apart from the distribution work that they do. 67% of them indicate distributing music/sound careers as their only source of income.

Figure 9.2.43 Distributors with other sources of income aside distributing music



Source: KPMG Analysis

9.3 Value of Sector (Revenue Sources and Estimation)

9.3.1 Framework for Analysis

The estimation of the contribution of music to the national income is determined by aggregating all the incomes received domestically. The major income generating sources are represented in the following equation:

$$Y_m = S + G + R + M + P$$

- Y_m = Income from the music sector
- S = Revenue from Sales. This comprises:
  - Sale of CDs and cassettes
  - Digital sales
  - Sale of musical instruments
- G = Revenue from Gigs/Live performances. This comprises:
  - Gigs by Musicians and/or performers
  - Gigs by Traditional performers
  - Gigs by Public bands
  - Gigs by Spinners
- R = Royalties
- M = Merchandizing and advertisement
- P = Sponsorship (public and private investment)

Revenue from sales

Revenue from sales is determined by using the total value of CDs and cassettes, domestically produced musical instrument, and digital sales (including jingles).

- Sale of CDs and Cassettes

The estimation of the sale of CDs and cassettes is done using the value added approach. Since the CD is produced externally it is not counted as part of income generated from the music industry. The proportion of the cost of the CD is then deducted from the producer price of the CD to arrive at the value added to the blank CD or cassette.

Mathematically;

AS (number) X AP (producer price) + M_{dr} *– CCDC (cost) = Total Sales*

Where,

AS is Average sales

AP is average price

M_{dr} *is margin for the distributor/retailer*

CCDC is the cost of CD or cassette

- Digital sales

Digital sales refers to the use of music by mobile network operators (MNOs) in Ghana. Music is used by MNOs as caller ring back tunes (RBTs) and users also download and use them as ring tones. We estimate digital sales by identifying the charge per download by the MNOs and multiply by the average number of downloads per month. This number is annualised and multiplied by the total number of MNOs. This results in the revenue generated from digital sales.

- Sale of Musical Instruments

Music instrument manufacturers include those carving various kinds of indigenous musical instruments. We estimate the total sale per year for musical instruments produced in Ghana by estimating the average sale per producer and multiplying it by the total number of artists in Ghana.

Revenue from Live Performances/Gigs

- Gigs by Musicians and/or Performers, Public Bands, Traditional Performers and Spinners

Live shows are performances at various venues and are now major sources of revenue for the industry. From the survey, we estimate the number of times musicians and performers are engaged in live shows and the average earnings. This includes performers, public bands, and traditional groups involved in commercial activities. Revenue from live shows is then determined by multiplying the number of live shows by the average charge.

The total number of spinners operating in the country is estimated as well as the number of times they attend shows and the average charge per show. Total income generated is estimated by extrapolating for the entire population of spinners.

Royalties

GHAMRO is the main collecting society for the music sector. The estimated total collection for 2012 is added to the other sources of revenue.

Merchandizing and Advertisement

This is made up of income generated by artiste from adverts and promotional activities. We estimate the average earnings per artiste and multiply by the total number of artiste within the formal sector.

Sponsorship

This is made up of sponsorship obtained from various entities to support music professionals. It is arrived at by estimating the average earnings from sponsorship and extrapolating for the population.

9.3.2 Domestic Revenue Estimation

A. Revenue from Production and Sale of CDs

Information on the revenue generated from the production and sale of CDs is presented in Table 9.3.1.

Table 9.3.1 Value addition from production and sale of CDs

		Musicians	Producers	Traditional	Total
Total number		2,000	216	404	
Annual CD production		812,719	3,789,153	175,859	4,777,730
Producer price		2.95	2.95	2.95	
Producer revenue		**2,397,521**	**11,178,000**	**518,784**	**14,094,305**
Less:					
Blank Cd and case	20%				2,818,861
Waxing	per 1,000 CDs				3,344,411
Printing	per CD				3,487,743
Sub-total					**9,651,016**
A.Value addition					**4,443,289**
Distributor/Retailer margin per CD		1.72	1.72	1.72	
Revenue to distributors/retailers		**1,397,877**	**6,517,342**	**302,477**	**8,217,696**
Less					
Rent					1,479,109
Electricity					1,060,643
Transport costs					1,894,947
Sub-total					**4,434,699**
B. Value addition					**3,782,997**
Total Value Addition from CD Sale (A+B)					**8,226,286**

Source: KPMG Analysis

Revenue from musicians includes the proportion of musicians who produce themselves. This was estimated to be 67.6% from the sample. Total CDs produced by musicians was estimated to be 812,712 per year. The average price charged by producers was also estimated to be GH¢2.95 per CD to distributors resulting in a total revenue of GH¢2.4 million. Distributors and retailers put a margin of GH¢1.72 on each CD resulting in a total revenue of GH¢1.4 million.

The survey put the total number of producers at 216 with an annual production of 3,789,153 CDs. Based on the producer price and retailer margins the total annual revenue generated from CDs is 17.7 million.

Traditional groups also produce CDs which was estimated to be 175,859 per year resulting in a total revenue of GH¢821,261.

Total revenue from the sale of CDs is thus estimated to be GH¢22,312,001.

Value Addition

Production and sale of CDs include some costs that are deductible for purposes of GDP calculation. In order to arrive at the values added these costs, which include cost of blank DCs, waxing, cover printing, rent electricity and transportation are accounted for. The results is a value addition of GH¢8.2 million.

B. Revenue from Production and Sale of Cassettes

Table 9.3.2 also presents revenue from the sale of cassettes. Due to the dominance of CDs on the market, cassettes sales are expected to be dwindling, though no historical data was available for analysis. The study found cassettes to be patronised by the rural folks and those who have cassettes players.

Table 9.3.2: Value addition from cassette production and distribution

	Musicians	Producers	Traditional	Total
Total number	2,000	216	404	
Annual Cassette production	103,299	622,373	90,306	815,978
Producer price	1.33	1.33	1.33	
Producer revenue	**137,388**	**827,756**	**120,107**	**1,085,250**
Accountable expenses				743,121
Value addition				**342,130**
Distributor/Retailer margin per Cassette	1.11	1.11	1.11	
Revenue to distributors/retailers	**114,662**	**690,834**	**100,240**	**905,735**
Accountable expenses				416,953
Value addition				**488,782**
Total Value Addition from Cassettes Sales				**830,912**

Source: KPMG Analysis

Musicians, producers and traditional groups produced a total of 815,978 cassettes per year. The average producer price of cassettes was estimated to be GH¢1.33 per cassette resulting in a total revenue of GH¢1.09 million. The distributor/retailer margin was estimated to be GH¢1.11 per cassette resulting in a revenue of GH¢0.91 million to distributors and retailers. Total revenue from cassette sales is estimated to be GH¢5.67 million minus the imported materials of about GH¢1.13 million. Domestic revenue from sale of cassette is thus estimated to be GH¢2.0 million.

Value Addition

To estimate the value added through cassette production, certain cost items were deducted to avoid double counting. The total amount of value added by cassette production is estimated to be GH¢0.8 million.

C. Revenue from Sale of Musical Instruments

Table 9.3.3 presents the type, annual production and the price of each instrument.

Table 9.3.3 Revenue generation from sale of instruments

Item	Average number per year	Average price per year	Income
Drums (Dondo, Atumpan, Fontofrom etc)	125,357	166	20,840,625
Xylophone	17,143	188	3,220,408
Atenteben	214,286	41	8,705,357
African lute	7,500	33	243,750
Harp lute (Saprewa)	536	20	10,714
Bamboo flutes and whistles	36,429	18	655,714
Horns	11,786	25	294,643
Cowbells/Gongong	17,679	29	512,679
Maracas/Shakers	122,143	25	3,053,571
Claves	73,929	26	1,946,786
Total (Ghana cedis)			**39,484,247**
Less Costs		**Cost per year**	**Total cost**
Raw materials		5,452	6,814,775
Office rent		528	660,225
Electricity		765	956,250
Fuel		1,412	1,764,375
Transportation		1,547	1,933,350
Total			**12,128,975**

Source: KPMG Analysis

Total sales from instruments was estimated to be GH¢39.5 million. This is estimated based on the percentage of local producers who produce the instrument, average number per person per year and average price per instrument. When costs are accounted for in the calculation, we estimate value addition to be in the region of US$12.1 million.

D. Revenue from digital sales

Table 9.3.4 presents the analysis and approach used to estimate the revenue generated from Digital Sales.

Table 9.3.4 Revenue generation from Digital Sales

	MNO-1	MNO-2	Average
Charge per download	0.32	0.30	0.31
Number of downloads per month	350,000	300,000	325,000
Revenue per month	112,000	90,000	100,750
Revenue per year	1,344,000	1,080,000	1,209,000
Number of MNOs			**6**
Total revenue			**7,254,000**

Source: KPMG Analysis

Total revenue generated from digital sales was estimated to be GH¢7.3 million. This is estimated based on the charge per download, the number of downloads per month, and the total number of available MNOs.

Revenue from Live Performances

Live performances include gigs by musicians, traditional performances and the shows organized by spinners. Table 9.3.5 presents the revenue generated by musicians from live shows.

E. Revenue from Musicians

Table 9.3.5 Revenue generation from live shows

	Ghana	Abroad	Total
Percentage who perform live/gigs	77.10%	5%	
Number	1,542	100	
Average number of shows per year	20	6	
Charge per show (Ghana cedis)	1,118	4,700	
Revenue	**34,479,120**	**2,820,000**	**37,299,120**

Source: KPMG Analysis

Revenues from live shows are calculated for performances both in Ghana and abroad. Based on the survey conducted, it was estimated that 77.1% of musicians performed live shows in Ghana, averaging 20 shows per year. At an average rate of GH¢1,118 per show revenue from live shows was estimated to be GH¢34.5 million per annum. The survey also found out that 5% of musicians had performed live shows abroad averaging 6 per annum. It was estimated that musicians charge an average of GH¢4,700 per show abroad resulting in a total revenue of GH¢2.8 million.

F. Revenue from Traditional Groups

Table 9.3.6 presents revenue generated by traditional groups.

Table 9.3.6 Revenue generation from traditional groups

	Number	Charge	Valid percentage	Amount
National events	4	604	21%	223,762
Competition	3	750	25%	231,706
TV appearance	9	591	13%	266,854
Beach events	25	988	12%	1,159,302
Funerals	28	679	84%	6,360,114
Other events	17	709	15%	744,829
Total (Ghana cedis)				**8,986,567**

Source: KPMG Analysis

The estimated number of groups from data obtained from NCC and interviews is 404. The valid percentage column shows the proportion of the sample involved in each event. Based on the average number of appearances and charges, the revenue generated from traditional performance was estimated to be GH¢8.9 million.

G. Revenue from Spinners

Based on the total number of spinners countrywide estimated to be 2,825, the survey also revealed that each spinner is engaged in an average of 42 shows per year. The average charge per spinner is estimated to be GH¢229 resulting in a total revenue of GH¢27,223,596.

Table 9.3.7 Revenue generation from spinners

	Ghana cedis
Revenue	27,223,596
Less costs (electricity, transport, fuel, etc)	9,807,827
Value addition	**17,415,768**

Source: KPMG Analysis

The value addition from spinners is estimated to be GH¢17.4 million

H. Revenue from Public bands

Table 9.3.8 presents the revenue generated by public bands.

Table 9.3.8 Revenue generation from public bands

Activity	Average Number	Average Charge	Valid Percent	Revenue
Outdoor (Beaches, carnivals, street parades)	14	300	100%	152,123
Funerals	48	300	100%	514,728
Traditional durbars, outdoorings and marriage ceremonies	16	300	100%	167,400
Total				**834,251**

Source: KPMG Analysis

The total number of public bands is estimated to be 36, obtained from interviews with directors of the various services. The valid percentage indicates 100 percent involvement of each of the bands. Based on the average charge rate of GH¢300 and the average number of activities under taken per year for each of the activities, the total revenue generated by the public bands is estimated to be GH¢834,251.

Royalties

GHAMRO is the body authorized to collect royalties in Ghana. Informal discussions with the management revealed 2012 generated royalties amounting to a little over GH¢700,000.

Merchandizing/Advertisement

The survey revealed that 7.9% of musicians were involved in merchandizing or some form of advertisement. Annual revenue per musician is estimated to be GH¢2,426 resulting in an estimated revenue of GH¢388,996.

Sponsorship

The survey sought to estimate the total sponsorship for the sector based on the sample survey. This is estimated to be GH¢116,044 per year.

Summary of Revenue

Table 9.3.9 presents the summary of revenue from the sources described above. This excludes revenue from venue operators, telecommunications and sales from abroad.

Table 9.3.9 Summary of revenue

Summary of Revenue	Amount (GHC)	Percentage
Sales of CDS & Cassettes	28,350,434	15.0%
Live shows	74,598,240	39.5%
Digital sale	7,254,000	3.8%
Royalties	700,000	0.4%
Merchandizing and Advertisement	1,032,756	0.5%
Sponsorship	232,088	0.1%
Instrument manufacturers	39,484,247	20.9%
Spinners	27,223,596	14.4%
Traditional Performance	8,986,567	4.8%
Public bands	834,251	0.4%
Total (Ghana cedis)	**188,696,179**	**100.0%**

Source: KPMG Analysis

Based on the total number of 4,000 musicians, the total estimated income contribution from the music sector is estimated to be approximately GH¢189 million (US$57 million[13]).

9.4 Contribution to GDP

9.4.1 Summary of GDP

Table 9.4.1 Contribution of the music sector to GDP

Value Addition Areas	Amount (GHC)
Sales of CDS & Cassettes	11,236,041
Live shows	74,598,240
Digital sale	7,254,000
Royalties	700,000
Merchandizing and Advertisement	1,032,756
Sponsorship	232,088
Instrument manufacturers	27,355,272
Spinners	17,415,768
Traditional performance	8,986,567
Public bands	834,251
Total	**149,644,983**
2012 GDP at current prices (Ghana cedis)	73,109,000,000
Percentage of music contribution	**0.20%**

Source: KPMG Analysis

Using the year 2012 as a base year, GDP at current prices is estimated to be GH¢73 billion. Revenue from legal operations of music professionals is estimated to be GH¢0.19 billion and the value added stands at GH¢0.15 billion. The contribution of the music sector to GDP stands at 0.20%.

[13] Conversion was carried out at an exchange rate of 1 USD to 3.3 GHC, which was the prevailing rate as at 04th July, 2014.

10 Social Characteristics & Contribution

10.1 Social characteristics of the sector

This section presents the social dynamics of the professionals within the industry value chain. It specifically presents

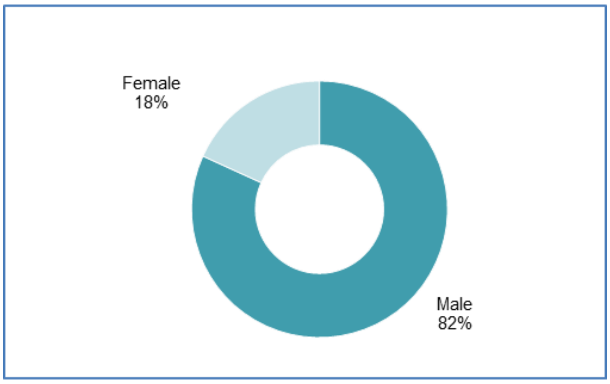
10.1.1 Creators

Performers

- *Gender*

Figure 10.1.1 shows the proportion of musicians who are males as against females. The sample revealed that 82% of them are males and the remaining 18% females

Figure 10.1.1 Gender of performers

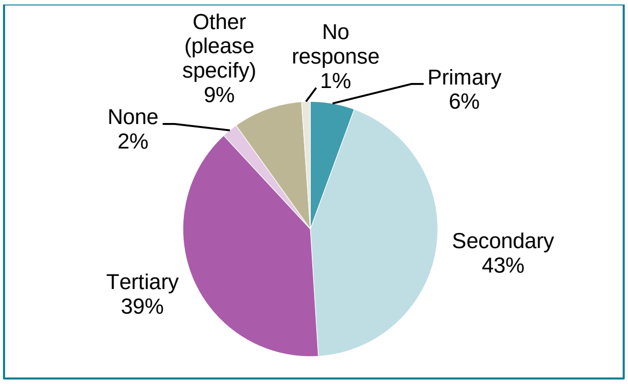


Source: KPMG Analysis

- *Education*

The study sought to find out the education level of musicians and also the level of music education they have. The following charts present the results.

Figure 10.1.2 Level of music education of performers



Source: KPMG Analysis

Whilst 43% have secondary education, 39% reported that they have had tertiary education. On the issue of music education, majority (51%) reported that they have had no form of music education with 19% and 15% having music education at the primary and secondary levels respectively. Just fewer than 10% have had some form of tertiary education in music highlighting the need to ensure education at the higher level in order to add value.

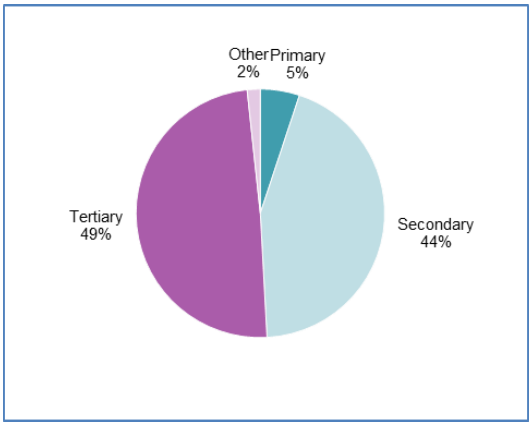
10.1.2 Business Category

Producers/Publishers/Record Label

- *Level of Education*

In terms of the level of education, 49.2% of producers have had tertiary education with 44.1% having education up to the secondary level. The remaining 6.7% had their education level either up to the primary level or had other form of education.

Figure 10.1.3 Educational Level of producers

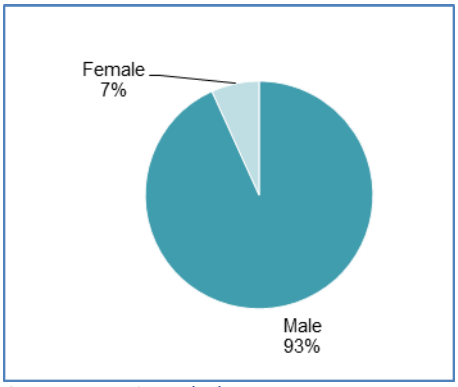


Source: KPMG Analysis

- *Gender*

The main players of this industry are mostly males constituting 93% of all producers. The females in this subcategory are less than 10% since it is perceived to be predominantly, a male dominating subsector.

Figure 10.1.4

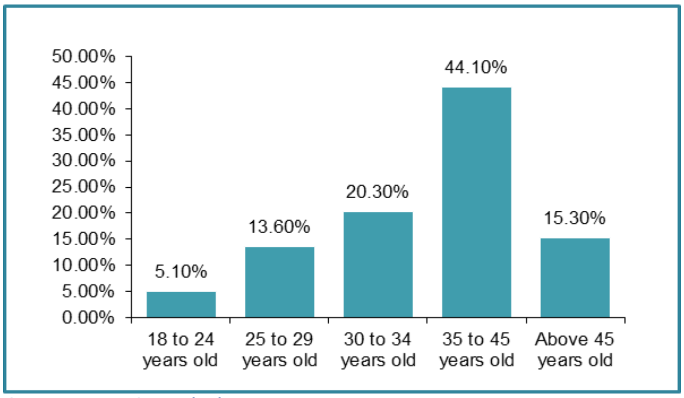


Source: KPMG Analysis

- *Age Structure*

Analysis of the age distribution of the sub-category indicates the majority of them are less than 45 years. Respondents between 35 years and 45 years constitute 44.1% of the entire sample. The age structure indicates a youthful composition indicating the industry has future. Those beyond 45 years constitute 15.3% of the sample.

Figure 10.1.5 Age structure of producers



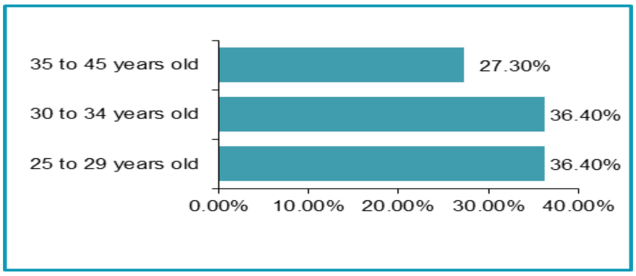
Source: KPMG Analysis

Artiste Managers

- *Age Structure*

It was observed from the research that there were no artiste managers associations in Ghana. All (100%) of the respondents to the Artiste Manager questionnaire were males, indicating a male dominated professional category in Ghana. It is evident from the age structure that one requires some considerable maturity and experience of some sort in order to manage Artistes. This is explained with 72.8% of the respondents' ages ranging between 25-34 yrs as seen in the chart below.

Figure 10.1.6 Age structure of artiste managers

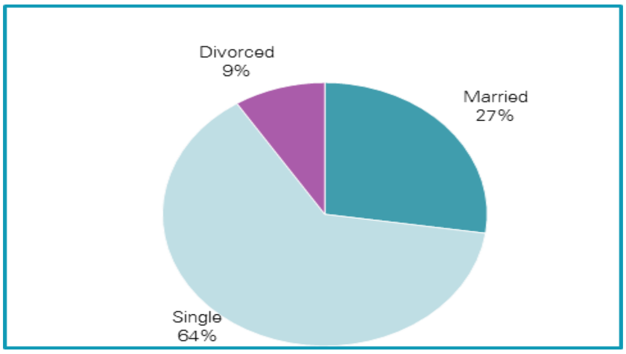


Source: KPMG Analysis

- *Marital Status*

From the analysis of the marital status of artiste managers, it was realized that 64% of them were single, 27% were married whereas the remaining 9% were divorced.

Figure 10.1.7 Marital status of Artiste Managers

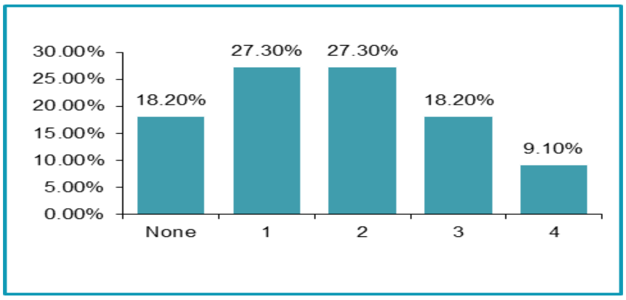


Source: KPMG Analysis

- *Number of dependants*

As most of the respondents to this category were within the 25 – 34 age bracket it is not at all surprising that most of them had dependants. However, it is also observed as from above that most of them (64%) are single. Those who had 1 or 2 dependents both recorded 27.3% each. Those who had 3 and 4 dependents were 18.2% and 9.1% respectively. Also, 18.2 % had no dependents.

Figure 10.1.8 Number of dependents of artiste managers

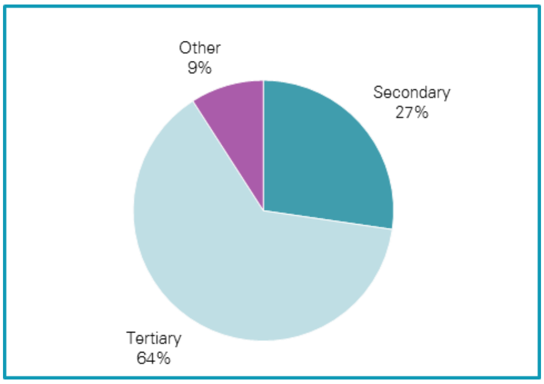


Source: KPMG Analysis

- *Educational level*

From the analysis of the survey as indicated in the chart below, it was realized that a greater percentage of respondents had attained the tertiary level of education. As much as 64% had their education to the tertiary level. 27% attained the senior high level and the rest of the 9% had some other form of training. This indicates the level of sophistication and skill required to work as an artiste manager.

Figure 10.1.9 Educational level of artiste managers

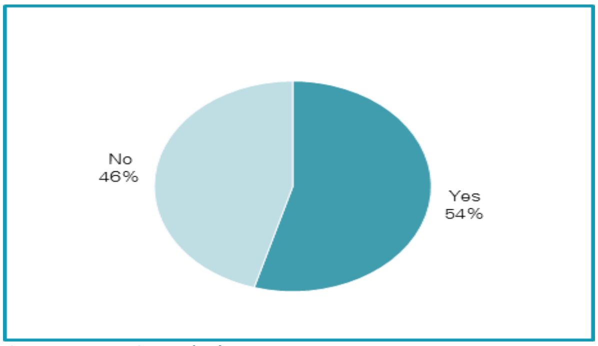


Source: KPMG Analysis

- *Training in managing artistes*

Even though almost all the respondents were educated, not all had any form of education in managing artiste. 54% of the interviewers responded to having some form of training when it comes to managing artistes. The rest did not have any form of formal education as indicated in the chart below.

Figure 10.1.10 Percentage of Artiste Managers who have received training in managing artistes

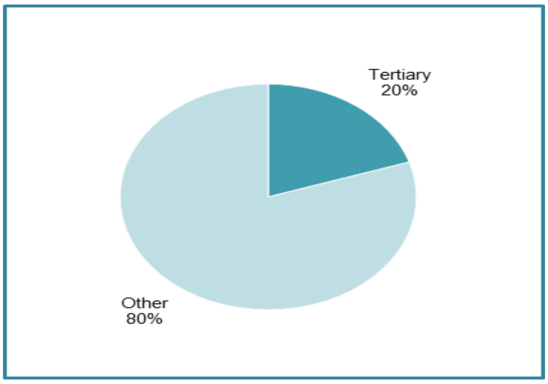


Source: KPMG Analysis

- *Level of education in managing artistes*

Out of the 54% who have had education in managing artistes, 20% of them have tertiary level education and the remaining 80% have some other form of education in managing artistes.

Figure 10.1.11 Level of education of artiste managers



Source: KPMG Analysis

Studio Managers

- *Age, marital status and number of dependants*

The respondents were aged between 25 and above 45. 25% of them were between 25 and 29 years whereas the remaining 75% were above the age of 45 years. Exactly half of the respondents were married. 25% were single and the remaining 25% were divorced. The number of dependants for respondents within this industry ranged between 1 and 4 with even distributions of 25% each. These are indicated in the Figure 6.1.8 to Figure 6.1.10.

Figure10.1.13 Age distribution of recording studio professionals

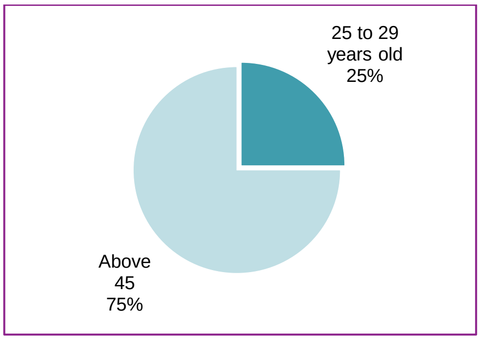
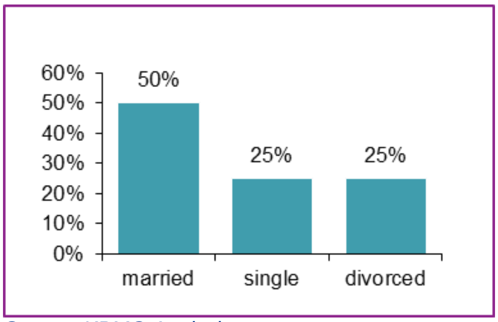
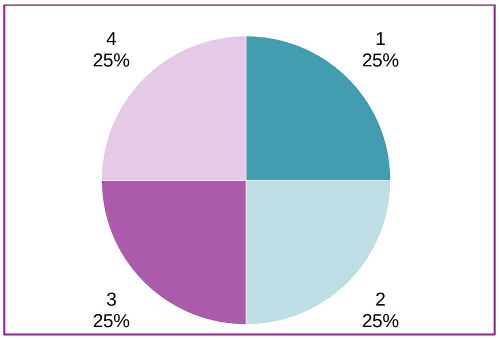


Figure10.1.14 Marital status of recording studio professionals



Source: KPMG Analysis

Figure10.1.15 Number of dependents of recording studio professionals



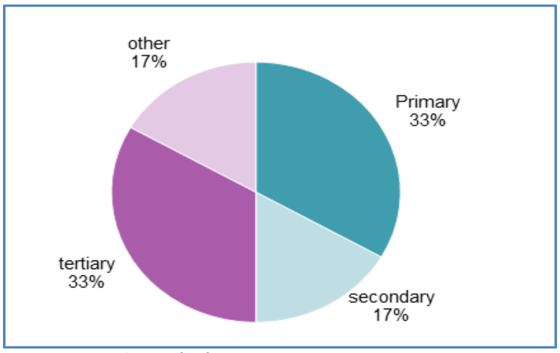
Source: KPMG Analysis

Source: KPMG Analysis

- *Education*

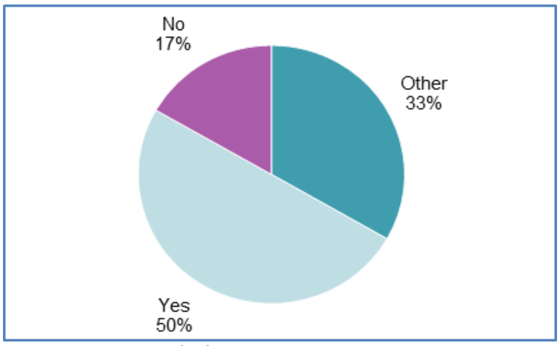
From the study, almost all studio managers have some form of education and 33% have education to the tertiary level. Also 50% of interviewees have training in recording and 33% in other forms of training. Only 17% have no training in recordings.

Figure10.1.16 Level of education



Source: KPMG Analysis

Figure10.1.17 Training in recording



Source: KPMG Analysis

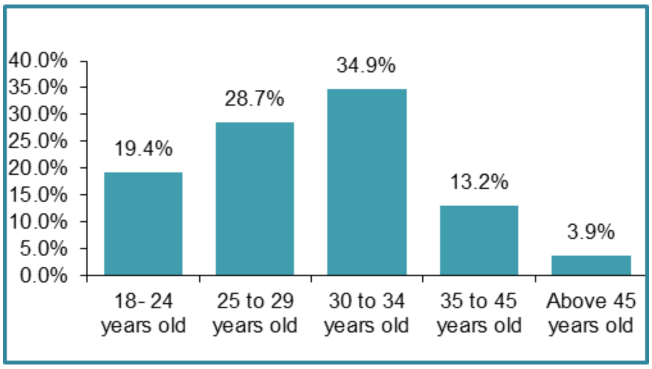
Spinners

Spinners are a small unit or group, normally made of three people, who provide music during activities such as funerals and outdoorings. This section presents the employment characteristics of spinners.

- *Age Structure and Gender*

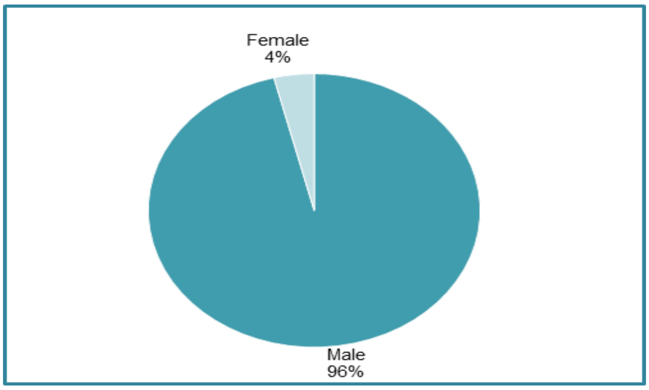
Figures 10.1.18 and 10.1.19 present the age characteristics and the gender of spinners.

Figure 10.1.18 Age structure of artiste managers



Source: KPMG Analysis

Figure 10.1.19 Gender of Spinners



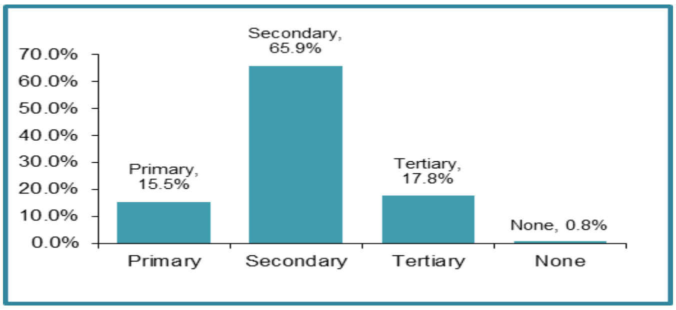
Source: KPMG Analysis

The age structure shows a youthful composition with a greater percentage of spinners below 34 years. Almost all spinners are males with 4% being females.

- *Education Level*

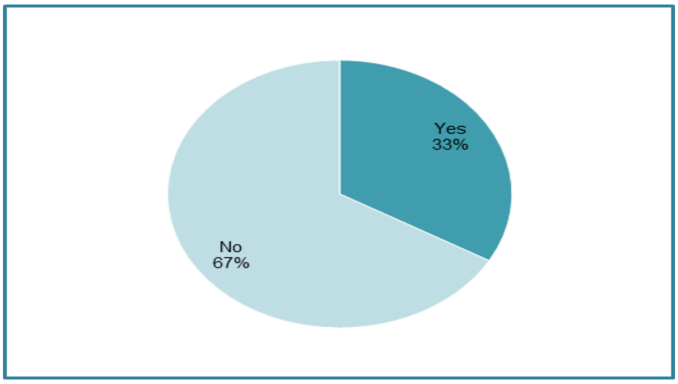
Figures 10.1.20 and 10.1.21 present the level education and also the education in spinning.

Figure 10.1.20 Educational level of Spinners



Source: KPMG Analysis

Figure 10.1.21 Spinners who have education in spinning



Source: KPMG Analysis

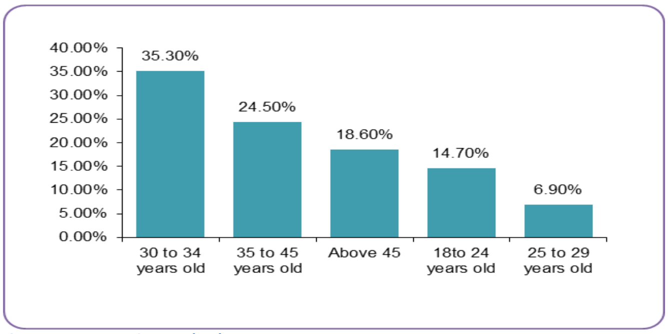
A greater proportion of spinners constituting 65.1% have education to the secondary level. One-third have some form of education in spinning at various levels while majority have no education in spinning at all.

Distributors/Retailers

- *Age*

The age distribution of the distributors is between 29 and above 45 years. Most of the respondents (35.3%) were aged between 25 and 29 years followed by an age range of 35 to 45 (24.5%). 18.6% of them were between the 18 to 24 age bracket and 14.7% were between the 30 to 34 age bracket. 6.9% of the respondents were aged above 45 years.

Figure 10.1.22 Age structure of Distributors

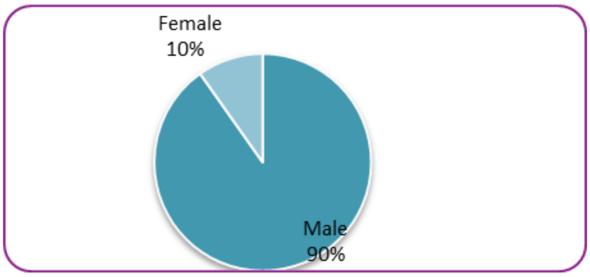


Source: KPMG Analysis

- *Gender*

The function of distribution music/sound carriers is a male dominated activity. Distributors in the industry are 90% males and 10% female.

Figure 10.1.23 Gender distribution of Distributors

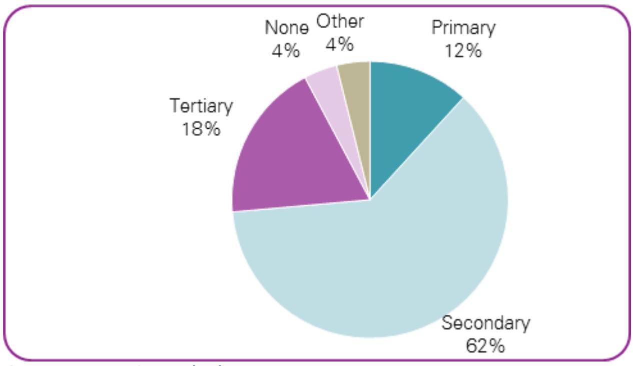


Source: KPMG Analysis

- *Education*

Most of the distributors in the industry are educated. Approximately 96% of the population are educated between the Primary and Tertiary levels. Those with secondary level of education have the highest which is about 62%, tertiary has the next highest which is 18% followed by primary which is 12%. 4% of them are uneducated.

Figure 10.1.24 Level of education of Distributors



Source: KPMG Analysis

10.2 Overview

The creation, performance, significance, and even the definition of music vary according to culture and social context. Music and society have always been intimately related. Music reflects and creates social conditions, including the factors that either facilitate or impede social change. It is powerful at the level of the social group because it facilitates communication which goes beyond words, enables meanings to be shared, and promotes the development and maintenance of individual, group, cultural and national identities.

10.3 Sociological aspects of music

The sociological aspect of music has been a key subject of many scholarly publications and discussions. The sociological salience of music can be framed in terms of three sets of questions:

1. Ontology: in terms of social relations, *what is music?* Bohlman (Bohlman, 1999) has identified three ontological approaches to music, conceptualizing music as an object, as a process and as being embedded*.*

2. Meaning: how do people create meaning from or in relationship to music?

3. Function: what does music do in social relationships and what do people do with music?

The different assumptions that people have about the social nature of music can help to explain the different consequences of their way of doing music. Assumptions about *'what music is*' are related to what one does with music, the social relationships in which music is done, and the relationship between activity and context. Even more sociological is Bohlman's third aspect of ontology, focusing on the embeddedness of music, treating it as part of another social activity, inseparable from it. Here music is treated in terms of its function for a social activity. A hymn becomes something other than a hymn when taken out of a religious setting, as does a folk song when piped into an elevator. Commercial music created, produced, and distributed through monetary exchange is treated as fundamentally different from religious music that fuses individual worshipers into a congregation collectively creating the social presence of a deity. The music is seen not only as influencing the event, as though the event could exist without it, but helping constitute the event itself. For many, a religious service without music (hymns in some circles) does not feel fully like a religious service, nor does an aerobics class without music feel quite real. Music helps order the pace, feel, and energy of interaction that make the events "really" what they are. Thus music helps order the events both in the sense of providing a proper sequence and the deeper sense of social order—how people relate to each other through precognitive structuring (Bohlman, 1999), (Roy, 2010) and (DeNora, 2000).

10.4 Benefits of music

Music is beneficial at the individual level because it can induce multiple responses – physiological, movement, mood, emotional, cognitive and behavioural. The benefits of active engagement with music throughout one's lifespan cannot be overstated. In early childhood there seem to be benefits for the development of perceptual skills which affects language learning subsequently impacting on literacy which is also enhanced by opportunities to develop rhythmic co-ordination. Fine motor co-ordination is improved through learning to play an instrument. There is a strong connection between music and mathematics. Music also seems to improve spatial reasoning, one aspect of general intelligence which is related to some of the skills required in mathematics. While general attainment is clearly affected by literacy and numeracy skills, motivation which depends on self-esteem, self-efficacy and aspirations is also important in the amount of effort given to studying. Music can be very effective when trying to learn a new concept (i.e. multiplication table) or memorizing facts (i.e. historical data). Often, learning a certain concept or lesson is more easily understood by the student when music is incorporated. Engagement with music can enhance self-perceptions but only if it provides positive learning experiences which are rewarding. This means that musical experiences need to be enjoyable providing challenges which are also attainable. Teaching needs to generate an environment which is supportive and sufficiently flexible to facilitate the development of creativity and self-expression. Group music making is also beneficial to the development of social skills and can contribute to health and well-being throughout the lifespan and can therefore contribute to community cohesion providing benefits to society as a whole (Hallam, 2010).

The power of music to act therapeutically has also been long recognized. Therapy can involve listening to and/or actively making music. Music can be effective in conjunction with other interventions in promoting relaxation, alleviating anxiety and pain in medicine and dentistry, and promoting wellbeing.

The findings of a study that sought to examine the personal meaning and importance of music in the lives of older Australians who are 65 years and over, revealed that music provides people with way of understanding and helps in developing their self-identity, it helps in connecting with other people and providing strong associations, it helps in maintaining wellbeing, experiencing and expressing spirituality and it helps associating with memories of a person's life. Specifically, the results show how music is used as a source of entertainment as well as a forum to share and interact with others. Respondents in the study described how music allowed them to engage in imaginative play and to escape from some of the hardships experienced in later life. The results revealed that, music promotes quality of life by contributing to positive self-esteem, by helping people feel competent and independent, and by lessening feelings of isolation and loneliness. The study concludes that music can be used to maintain and to promote a better quality of life for older people (Hays & Minichiello, 2005).

10.5 Social groups and events

10.5.1 Social circles in Ghana

Popular within the social circles in Ghana are the Choral groups, Traditional/folkloric groups/bands and the Public bands. Almost all churches (particularly orthodox churches) in Ghana have at least one choral group that performs during the worship/church service, attends competitions/choral festivals or perform on commercial bases. Some choral groups perform at wedding ceremonies, funerals and other occasions of their church members. There are certain corporate organisations that have choral groups as a means of providing work life balance for their staff that have an interest in music. Such groups are mostly not commercial. Industry experts estimate the total number of choral groups to be about 10,000[14].

There are traditional/folkloric groups/bands all over the country. Due to their informal nature, there is always a difficulty to have an exact count of the number of groups that exist/operate. It is as well difficult to keep track of their activities or to gather information about such groups. Most social occasions like funerals, parties, festivals and durbars register performances from traditional groups, popular among the Ashanti, Volta and Greater Accra regions.

Aside the ceremonial activities, Public bands perform during certain social activities like marriage ceremonies, funerals, festivals and some outdoor traditional durbars. Popular among the musical genres they play include contemporary highlife and afro beat/rock/jazz.

10.5.2 Choral groups

Choral groups play very key roles in the industry. The study sought to determine the activities of choral groups and their contribution to the industry. Below are some charts to show the results of the study.

- *Years of Existence*

The study showed that most choral groups have been in existence over a long period of time. 66% of the groups interviewed have been in existence for over 10 years out of which 52% are over 20 years and the

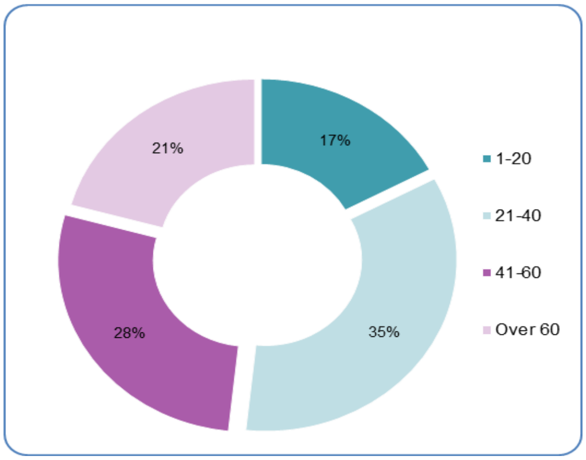
[14] Discussions with Dr. Amoah of the music department of the University of Ghana

remaining 14% have been in existence for 11 to 20 years. Also 24% of the groups interviewed have been in existence for 1 to 5 years and 10% are 6 to 10 years.

- *Group Numbers*

From the analysis, 83% of the groups have membership of over 20. 35% have a total membership of 21 to 40 people, 28% have 41 to 60 people and 21% have over 60 members. Only 17% have membership between 1 to 20 people.

Figure 10.5.1 Average number of persons in a choral group



Source: KPMG Analysis

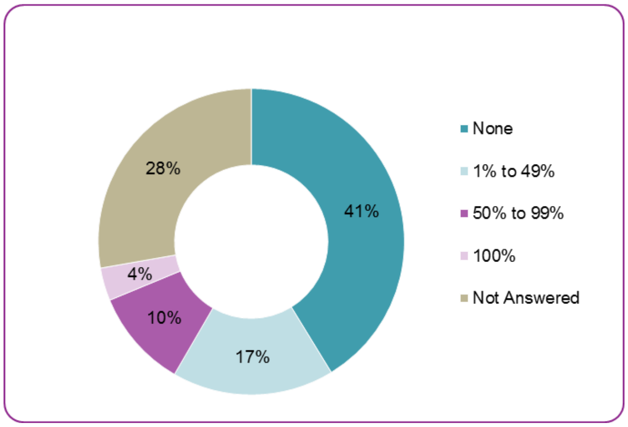
- *Gender*

A greater percentage of the groups interviewed are a made up of males and females. We observed that, 97% of the groups are a mixture of males and females and the remaining 3% have only male members. Out of the groups that are a mixture of males and females, 84% have over 50% of their members being females. We also observed that, 4% of the groups have 40% to 49% of their members being females, 8% of them have 20% to 39% of their members being females and the remaining 4% have 1% to 19% of the members being females.

- *Commercial Activities*

Choral groups are not mostly involved in commercial activities. 41% of interviewees are not involved in commercial activities during the year. 17% of choral groups have 1% to 49% of commercial activities and 10% have 50% to 99% of commercial activities during the year.
Only 4% are involved in commercial activities throughout the year and 28% did not answer to this question.

Figure 10.5.2 Proportion of activities that are commercial



Source: KPMG Analysis

- *Activities Performed*

Choral festival is the activity performed most by choral groups. 93% of activities performed in the year are choral festivals followed by national events which make 55%. The study also showed that choral groups are involved in competitions and this makes 52% of activities in the year.
TV appearance and studio recordings make up only 38% and 31% of activities performed respectively and most of the groups do not have albums accredited to them.

- *Composers of own choral music*

From the study, 86% of the choral groups sampled compose their own songs and the remaining 14% do not.

- *Producers of own choral music*

We observed that, out of the 21% that answered, 17% produce their own music and 4% use production companies.

- *Choral groups that own their instruments*

Most of the groups interviewed own instruments. 66% stated that instruments used for their activities are owned by the group and 17% do not own instruments. The remaining 17% did not answer to the question.

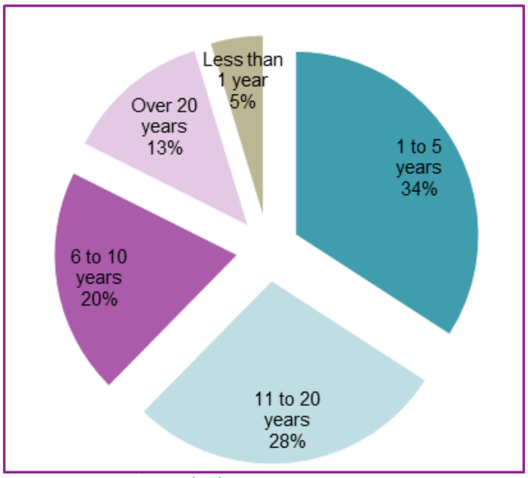
10.5.3 Traditional/folkloric bands

- *Years of existence*

One would typically expect traditional groups to have been operating for long periods, but it can be observed from the chart below that, the highest percentage distribution of respondents (34%) have been operating between age bracket of one to five years. This is followed by 28% of them who belong to the eleven to twenty years age bracket. 20% of them belong to the six to ten years age bracket. The widest age bracket, which is the more than twenty years age bracket is represented by 13% of them, only 5% of the respondents have been in operation for less than a year.

This can be due to the informal and part time nature of operations of these bands. Job security and opportunity of regular performances are not guaranteed as such cash inflows to bands are heavily affected. Most members of these groups are part time and have other sources of income. So the risk of collapse of these groups is rather high, leading to breakup of groups.

Figure 10.5.3 Years of existence of Traditional bands

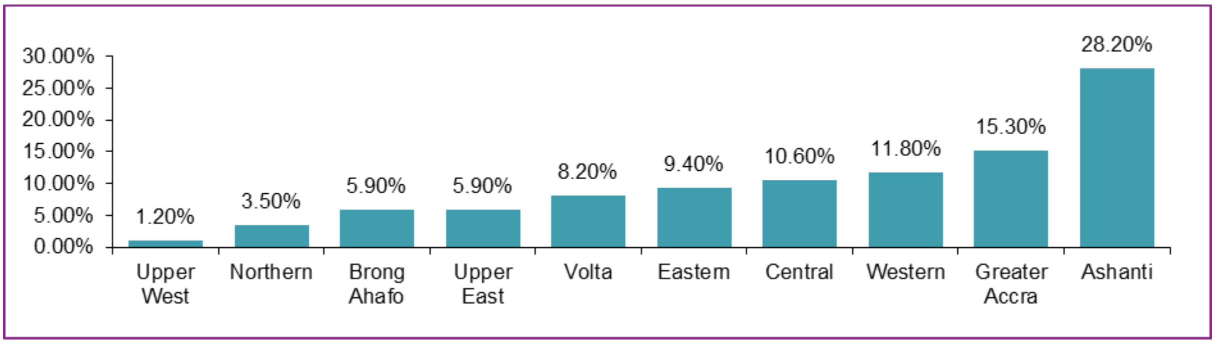


Source: KPMG Analysis

- *Regions*

Ashanti Region has a lot more bands than all the other regions (28.2%). The Greater Accra Region follows with 15.3%, followed by the Western Region with 11.8%. Each of the remaining regions has a percentage below 11%. Upper West is least represented with 1.2%.

Figure 10.5.4 Regional distribution of Traditional bands



Source: KPMG Analysis

- *Membership*

Figure 10.5.5 Membership of Traditional bands

Band membership	
Responses	80
Non responses	5
Response rate	94%
Mean	15
Minimum	1
Maximum	62

Source: KPMG Analysis

Out of 85 bands who responded to this questionnaire, 80 answered this question where as 5 did not respond to this question. Averagely, there are 15 persons in each band, with a minimum of 1 and a maximum of 62 persons in each band.

- *Gender Composition*

Most of the bands (79%) are made up of both male and female. 20% of the bands are all males and only 1% of the bands are all females.

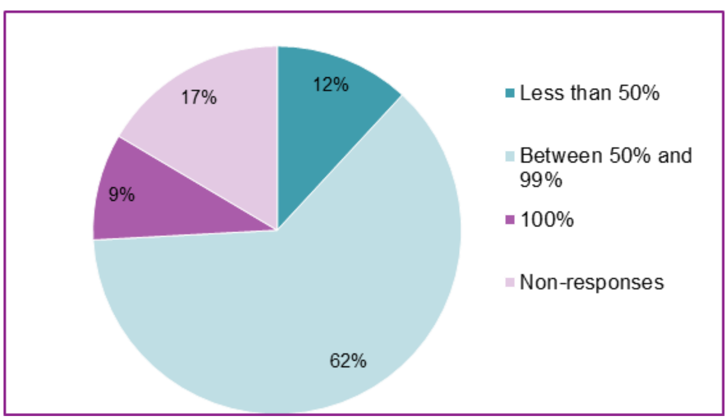
- *Memberships in Professional Associations*

We observed that most (60%) of the bands do not belong to any professional associations, 24.7% of them are members of the Musicians Union of Ghana (MUSIGA), 4.7% of them are members of the Ghana Music Rights Organization (GHAMRO) and 1.2% are members of the National Association of Ghanaian Music Producers. None of the bands belonged to any of the following associations; Association of Music Rights Owners (AMRO), Ghana Association of Phonographic Industries (GAPI), Composers and Authors of Music Association (CAMA), Ghanaian Association of Composers, Authors and Publishers (GACAP), Songwriters and Performers Association of Ghana (SPAG), Veterans Musicians Association of Ghana (VEMA), Professional Musicians Association of Ghana (PROMAG), Record Producer and Publishers Association of Ghana (REPPAG).

- *Commercial Activities*

We observed that not all the bands participate in commercial activities. Even out of those who participate in commercial activities we observed that, not all their activities are commercial. 62% of the bands, representing the largest percentage, have between 50% and 99% of their activities being commercial, 12% of them have less than 50% of their activities being commercial and 9% have all (100%) of their activities being commercial. However, 17% of them did not respond to this question.

Figure 10.5.6 Percentage of activities that are commercial

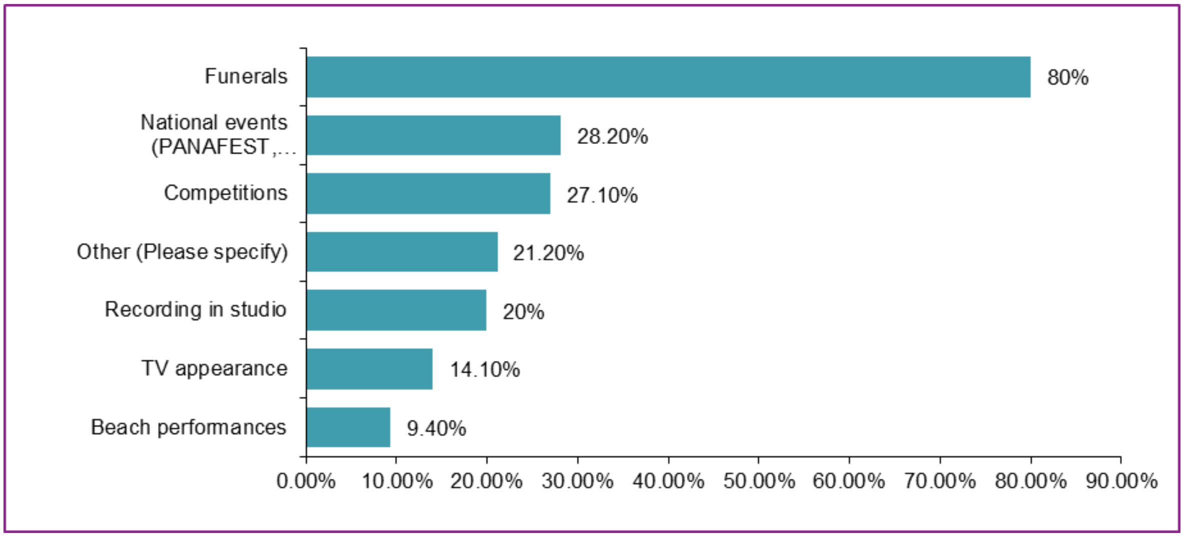


Source: KPMG Analysis

- *Types of activities*

It is observed from the analysis that most bands play at funerals (80%), the next most patronised activity by bands is attendance to National Events (28.2%). 27.1% of them participate in competitions, followed by other activities such as weddings, outdoorings and parties. Only 20% of them have studio recordings and 14.1% of them perform on TV. The smallest percentage of them (9.4%) participates in beach performances.

Figure 10.5.7 Types of activities under which traditional bands perform under



Source: KPMG Analysis

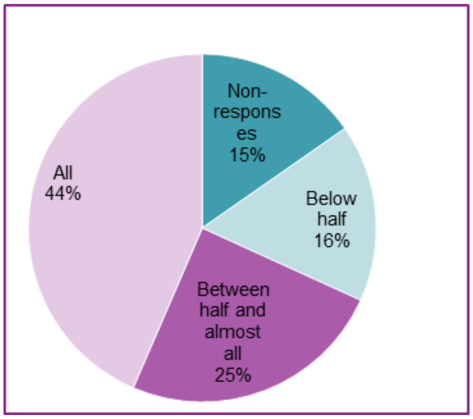
- *Song composition*

More than half of them (52%) compose their own songs. The remaining 48% perform songs already composed by others.

- *Self-financing*

We observed that, 44% self finance all (100%) their activities. We also observed that, 25% of them self-finance between half and almost all of their activities (i.e. about 50 – 100% of their activities)

Figure 10.5.8 Proportion of activities that are self-financed



Source: KPMG Analysis

- *Music production*

We observed that, 34% of the bands produce their own music, 12% are produced by a production company and 8% are produced by an individual producer.

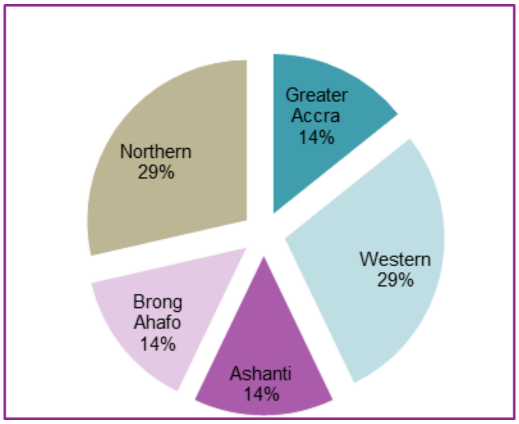
- *Instrument ownership*

Our analysis revealed that, 81% of the bands own their instruments and 19% of them do not. Out of those that do not own instruments, 7.1% of them share with other groups, 5.9% hire them and 3.5% are supplied with instruments by the venues they perform under.

10.5.4 Public bands

Public bands as were interviewed were grouped under the following categories Army (57%), Air Force (29%) and Navy (14%). Their distributions according to the various regions are as indicated below. The Northern and Western regions have the highest percentages of 29% followed by 14% for the Greater Accra, Brong Ahafo and Ashanti regions.

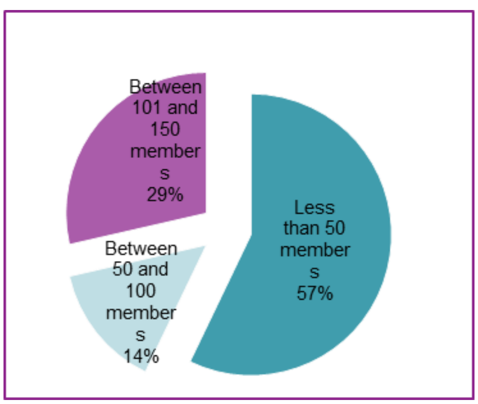
Figure 10.5.9 Regional distributions of public bands



Source: KPMG Analysis

It was observed that more than half of the bands (57%) were composed of both male and females. 43% of them were an all male band. Most of the bands (57%) have less than 50 members, 29% of them had a membership between 100 and 150.

Figure 10.5.10 Average membership of Public bands



Source: KPMG Analysis

- *Genres played*

All the bands play the following types of genres during their live performances: hip-life, classic highlife, art music, gospel, reggae, traditional/folkloric and jazz. 85.7% of them play contemporary highlife and afro beat/rock/jazz.

- *Activities performed*

85.7% of the bands are involved in national and international events and 71.4% of them have their performances appearing on TV. None of them partake in competitions. All the bands perform under funerals, traditional durbars, outdoorings and marriages. None of these public bands have been involved in studio recordings.

- *Song composition and studio recording*

We observed that 86% of public bands compose their own songs. For about 14% of them, all their performances are songs composed by others who do not belong to their band. Most (86%) of the bands do not have studio recordings. However 14% of them claim to have studio recordings.

- *Ceremonial activities*

We observed that, 57% of the bands have over half of their activities being ceremonial. Also, 29% of them have ceremonial activities forming 31% to 40% of their activities. None of the bands have an all ceremonial activity schedule.

11 Industry Infrastructure

11.1 Introduction

Music industry infrastructure comprises of training institutions (which considers educational institutions as well as capacity building institutions), local instrument manufacturers, digital music download companies, event organisers and venue owners/operators. Some characteristics about these categories have been identified and presented in the following sections.

11.2 Training Institutions

11.2.1 Educational Institutions

Educational Institutions are categorized either according to the level of tuition (be it primary, secondary or tertiary) or the type of ownership (be it private or public ownership). The following table presents the number of educational institutions in the various regions categorized as either privately owned or publicly owned. Details of the institutions are presented in Appendix A.

Table 11.2.1 Number of music educational institutions in the various regions

Region	Public	Private
Greater Accra	2 (including 1 tertiary institution)	14 (including 2 tertiary institutions)
Central	3 (including 2 tertiary institutions)	
Volta	-	4
Eastern	-	1
Western	-	1
Brong Ahafo	-	1
Northern	-	1
Ashanti	1 (tertiary institution)	-

Source: KPMG Analysis

This section presents the characteristics of educational institutions in Ghana. Including the nature of programs offered, teaching materials used etc.

- *Type of Institution*

The education system is basically made of private and public institutions. The study showed that the 57% of institutions interviewed are private institutions whereas the remaining 43% are public institutions. Thus, there are more private schools than public schools based on our research.

- *Level of Institutions*

From the study, 36% of the institutions sampled are primary and junior high schools (JHS), 29% are secondary schools, 21% are tertiary institutions and 7% pre-tertiary schools. 7% of the institutions interviewed did not answer the question.

- *Government policies*

Most of the institutions interviewed are not aware of any government policies that support music. Only 14% of the institutions are aware of such policies and the remaining 86% are not aware of any policy.

- *Curriculum in Music Education*

From our study, 79% of schools have music as part of the curriculum even though music has been merged into creative arts. Interviewees explained that music aids in teaching and students learn faster with music. 21% do not have music as part of their curriculum but they would want music to be reintroduced.

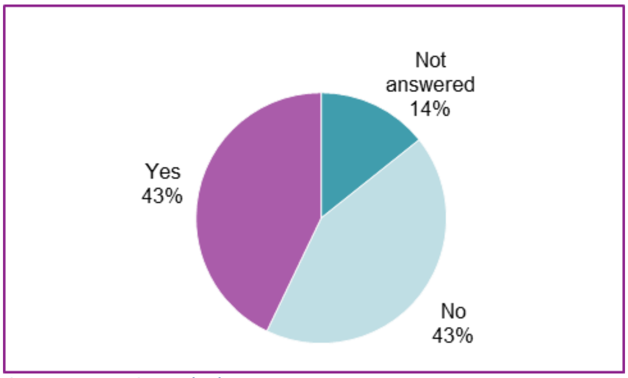
- *Nature of Music Programs*

The study showed that equal proportions of institutions teach music part-time and fulltime, thus 36% each. 14% teach music on both part-time and fulltime basis. The remaining 14% did not [15]answer.

- *Teaching materials*

The study also showed that 43% of institutions interviewed have adequate teaching materials and an equal proportion, which is 43%, do not have adequate teaching materials. This question was not answered by 14% of the institutions.

Figure 11.2.1 Proportion of educational institutions who have adequate teaching materials



Source: KPMG Analysis

[15] The working definition for partime was those with other sources of income and full time was those with only their current music related profession as their only source of income.

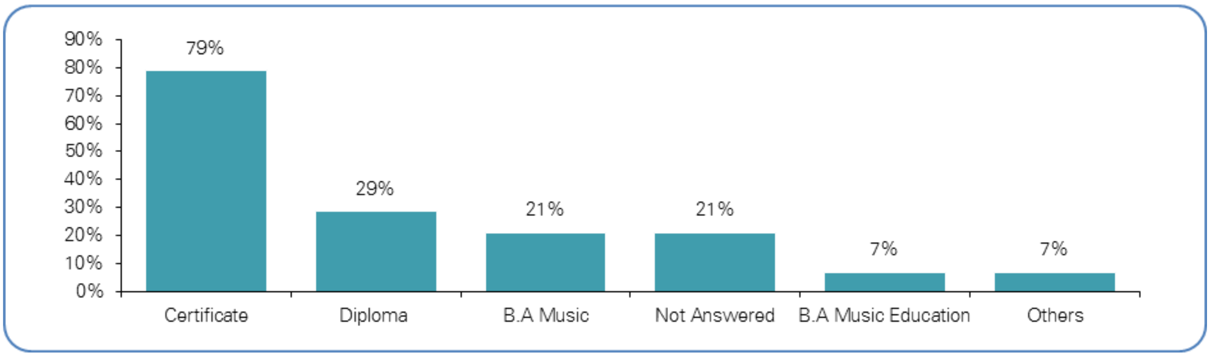
- *Use of Indigenous instruments*

Locally manufactured instruments are the main instruments used in the educational institutions sampled.
72% use indigenous instruments for teaching and only 14% use foreign instruments like guitar, piano and trumpets.

- *Music programs offered*

Most of the institutions interviewed run certificate music programs. From the study, 79% of the interviewees run certificate music programs, 29% run diploma programs in music, 21% offer Bachelor of Arts in music and 7% Bachelor of Arts in Music Education. 7% offer other music programs and 21% did not answer.

Figure 11.2.2 Types of music programmes offered by the educational institutions

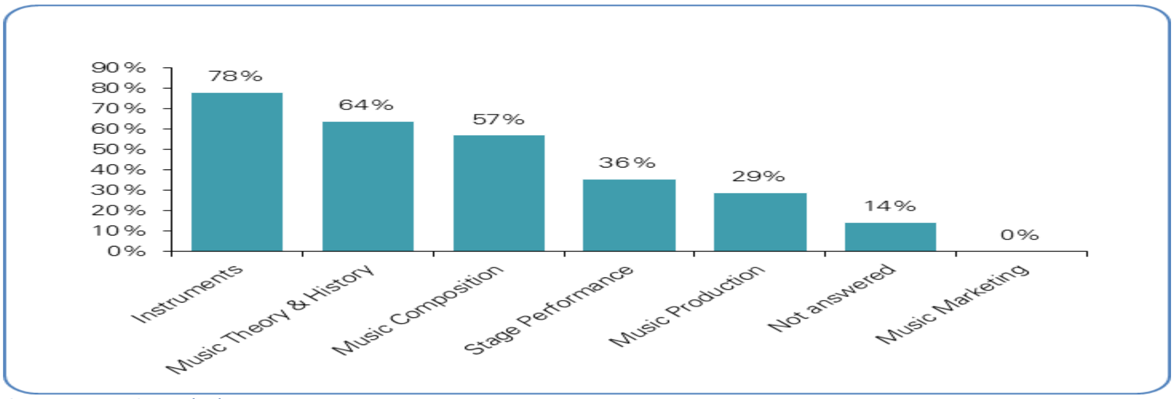


Source: KPMG Analysis

- *Subject Areas*

The subject areas under consideration were instruments, music theory and history, music composition, stage performance, music production and music marketing. 78% of the institutions teach instruments, 64% teach music theory and history, 36% teach stage performance and 29% teach music production. None of the institutions teach music marketing.

Figure 11.2.3 Subject areas taught by educational institutions



Source: KPMG Analysis

- *Number Graduating*

The table below presents the number students who graduate from three major tertiary institutions offering music.

Table 11.2.2 Number of students graduating annually

	University of Ghana	University of Winneba	Methodist University
Certificate			17
Diploma	10	35	5
Bachelor of Arts, Music	100	10	2
Bachelor of Arts, Music Education		54	
Other (MPhil)		38	
Total	**110**	**137**	**24**

Source: KPMG Analysis

The three institutions produce about 250 graduates annually who are capable of teaching music at both basic and secondary levels. It can therefore be estimated that tertiary institutions in Ghana produce over 500 graduates who can handle music as a discipline in the curriculum of schools.

- *Genres Preferred*

Contemporary and choral music are the most preferred genres by students with 64% each, followed by brass band which makes up 36% of institutions and traditional music makes 14%.

- *Profession of alumnae*

From the sample interviewed 64% stated that alumnae have professions in music and 7% of the institutions do not have alumnae in music profession. 29% of the institutions did not answer to this question.

11.2.2 Capacity Building Institutions

Aside the educational institutions, a number of bodies actively participate in building the capacity of industry professionals. The roles of these bodies are discussed below:

Goethe-Institut

The Goethe-Institut is the cultural institute of the Federal Republic of Germany with a global reach and was established in Ghana about 52 years ago. The Institut provides tuition on German language and has a German Library to support its educational activities. On the cultural side, it was originally oriented towards bringing in German classical artists (have Steinway Grand Piano at Institute) in Ghana but more recently geared towards enhancing local cultural scene through workshops and endorsing and networking new and upcoming creative groups or local artistes.

The Institut is funded from the German Government constituting 80% while the remaining is funded through internally generated funds from fees. Annual budget is estimated to be in the region of €500,000 with about 30% devoted to music related activities. Goethe-Institut does not directly provide funding to artiste but supports the development of the capacity of professionals through workshops on music marketing in Accra and Kumasi. The Institut also collaborates with other international and local organisations such as the Sub Saharan African based in Johannesburg, Alliance Française, Dubois Centre, Ghana Broadcasting Corporation (digitalizing the radio gramophone) and the Music around the world project with Kwame Adinkra.

The establishment of the European Union of National Institutes of Culture (EUNIC), which is a merger of all European countries' cultural attachés into a single body, will provide single body to provide assistance. EUNIC is expected to harmonize the cultural activities of EU countries and plans are in place to roll out training on intellectual property.

The Goethe-Institut has identified key challenges during their existence in Ghana. These include the lack of coordinated information flow on music, lack of music training schools, the limited venues for live performances, limited exposure abroad, high fees for live performance, and the unattractive packaging of music products.

Alliance Française

Created in Paris in 1883, Alliance Française aims to promote French language and cultural diversity through a recognised international network. Alliance Française in Ghana is a non-profit association. It is regulated by local law and is aimed at promoting French culture and education. Alliance Française started in 1957 and currently has four networks in Ghana (Accra, Kumasi, Cape Coast and Tema). The organization teaches French, organises live shows, art exhibitions, music concerts, seminars, workshops and collaborates with other organisations for festivals and general cultural public events. It has two main venues with the larger having a capacity of 400 people. Funding is mainly from the fees generated internally, sponsorship from French companies and the French Government (contributing about 15%). Due to the non-profit status, fees from live shows are subsidized hence income generated is limited.

Over the period of its existence, it has assisted musicians by organising workshops and seminars and also sponsoring festivals such as the “Hi Vibes”, “Charlie Wote” and a publication on highlife music. It also collaborates with non-profit making bodies such as the Goethe-Institut and the Spanish Embassy in organising events. These collaborations also involve sending artiste such as Dela Botri to Mali and bringing Malian artistes to Ghana and other regional exchanges to mainly Francophone countries. The organisation plans to set up a rehearsal studio for performers and a space for the sale of craft and CDs.

A major concern was the decline in the number of shows organized, reducing from 117 in 2010 to 65 in 2013, mainly because of the cancellation of long running weekly Paillotte program due to poor quality of bands. Other major challenges include the limited enforcement of copyright, lack of music learning facilities and the lack of funding sources for the music sector.

British Council

The British Council, which has operated in Ghana since 1943, is the UK’s organisation for educational and cultural relations. The Council, which is also a non-political organisation, also provided capacity building through training, introduction of best practice from the UK and identification of needs within the overall creative sector. Over the years, the Council has supported the music sector through training opportunities such as one organised during the Music Week which focused on music management and copyright, music law and the use of social media for music marketing.

The Council has an annual budget of about £50,000 for the music sector, which is relatively small for a country like Ghana. The main challenge has been the lack of clear work plan from the music sector which seeks to partner the Council in organising events to build capacity. Also the lack of a body to provide a clear vision and policy direction for the sector makes it difficult for engagement with the professionals.

The setting up of the EUNIC network will result in a strategic funding being created where the music sector can tap into it. It will also provide the platform for the body responsible for the creative sector to engage EUNIC in providing assistance to the creative economy.

Institute of Music and Development[16] (IMD)

The Institute for Music and Development (IMD), a local music organization, contributes to the evolution of a professional and vibrant music industry in Ghana and continues to play a pivotal role in the development of a self-sustaining music industry network in Africa through advocacy,

[16] IMD’s website

documentation of traditional and contemporary music styles and their dissemination through the electronic media as well as production of Audio visual material, human resource and institutional capacity building and creation of network opportunities.

IMD over the past year has carried out specific projects which include the management of the Ghana Cultural Fund and the Micro Credit Project for the music industry funded by the Danish Centre for Culture and Development. The organization also initiated the New Music Ghana and Orff in Ghana which are all aimed at identifying and developing music talents through training, workshops and per performances. IMD also collaborates with other organizations such as the Goethe-Institute in organizing some of its programmes.

11.3 Manufacturers

11.3.1 Local Instrument Manufacturers

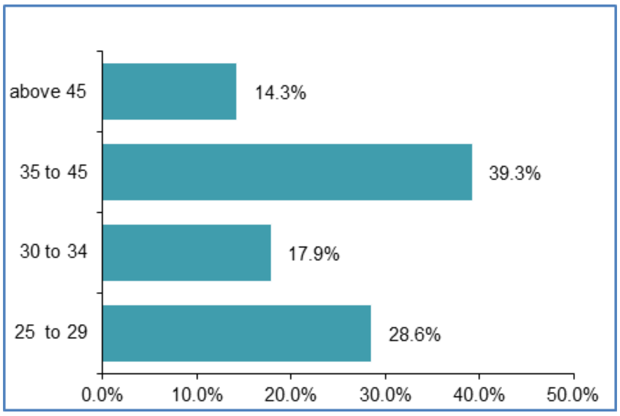
This section presents the employment characteristics of the manufacturers of local instruments such as drums (e.g. atumpan, dondo etc), maracas and Seperewa.

- *Age Structure*

The age structure shows a mixture of youthful and adult professionals in the wood carving. Over 85% percent were below 45 years. A significant proportion of 28.6% were found to be between 25 years and 29 years. This shows that the carving industry has potential to grow. A little over 14% were recorded to be over 45 years.

Conspicuously, all the respondents interviewed were males indicating the dominance of males in industry.

Figure 11.3.1 Age structure of local instrument manufacturers



Source: KPMG Analysis

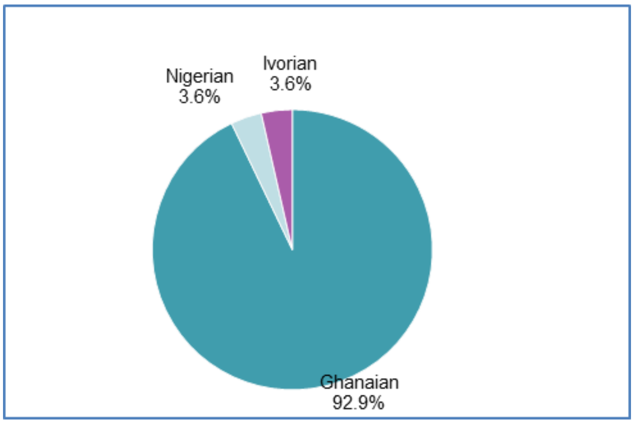
- *Educational Level*

Majority of the manufacturers have secondary education representing 57.1%. Primary school education constitutes 28.6% while tertiary education constituted 3.6%.

- *Nationality & Employment Status*

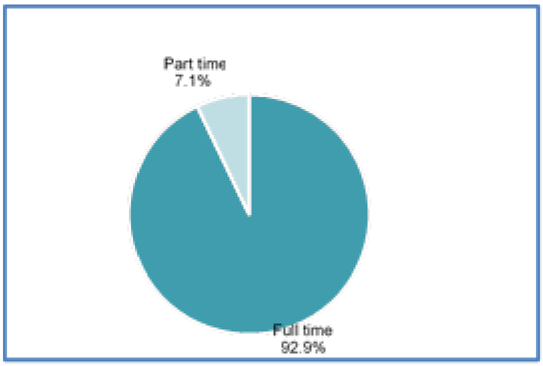
Ghanaians are the main manufacturers of musical instruments representing 92.9% with Nigerians and Ivoirians making up 3.6% respectively.

Figure 11.3.2 Nationality of local instrument manufacturers



Source: KPMG Analysis

Figure 11.3.3 Employment status of local instrument manufacturers



Source: KPMG Analysis

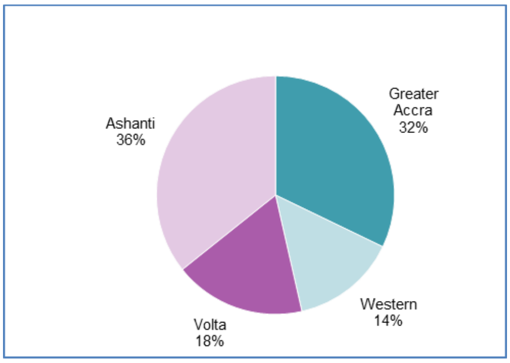
In terms of status of employment, the study found out that 92.9% of employees are fulltime workers. This implies the main source of income for their household is from the sale of instruments. Part-time workers make up 7.1% earning income from other main sources.

- *Location*

Four regions are the main locations for the manufacture of local instruments. This is presented in the diagram below. Ashanti Region was found to be the location with the largest number of carvers recording 36%.The result showed the importance of the region as far as the development in traditional music is concerned. Greater Accra Region followed with about one-third (32%) of carvers also highlighting the importance of the region in the traditional music.

Volta Region is the region with the third largest number of carvers (18%) and the Western Region recorded the least of 14%. Though other regions have carvers, they may not be specialized in instruments but other artifacts.

Figure 11.3.4 Region of operation – local instrument manufacturers

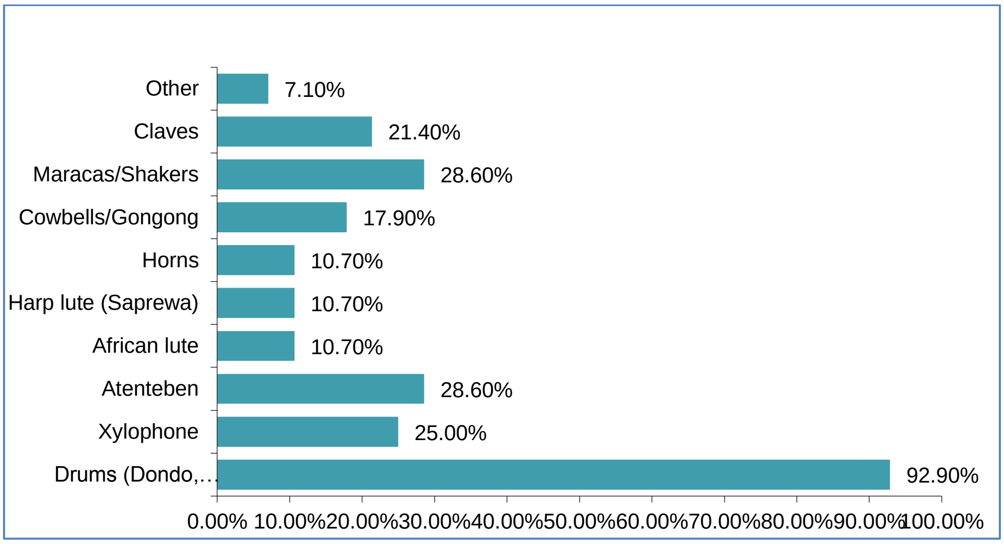


Source: KPMG Analysis

- *Types and Number of instruments*

The chart below presents the types of instruments manufactured.

Figure 11.3.5 Type of instruments manufactured

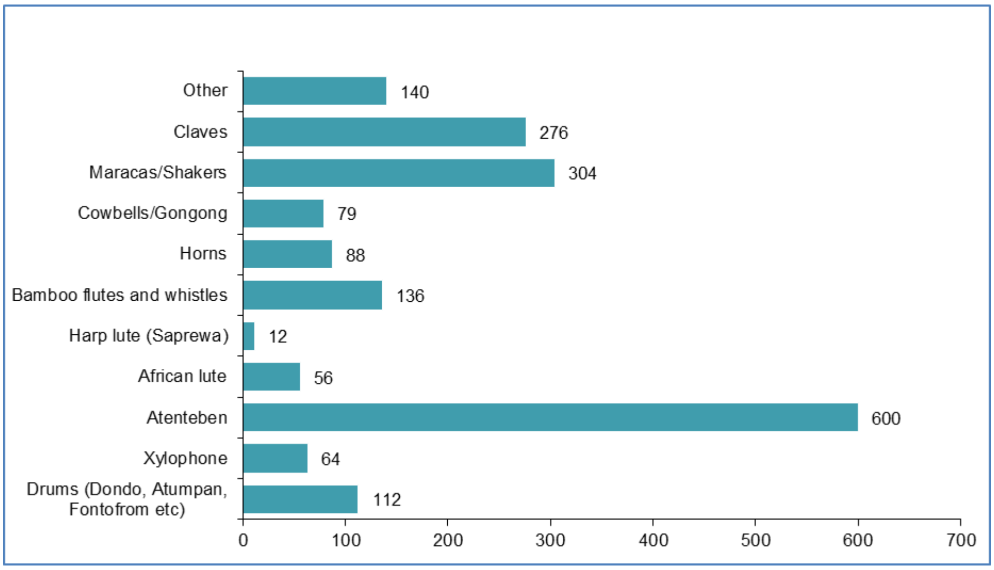


Source: KPMG Analysis

Drums are the main instruments manufactured by the carvers. 92.9% of the carvers manufacture drums such as dondo, atumpan and Fontomfrom. Maracas/Shakers and atenteben are the most produced after drums representing 28.6% of respondents. A quarter (25%) of the respondents manufacture xylophones and a little over 20% manufacturing claves.

Figure 11.3.6 presents the average number of instruments manufactured per year.

Figure 11.3.6 Number of instruments produced per year



Source: KPMG Analysis

Atenteben is the most produced instrument among the sample, recording an annual production of 600. This may be due to the ease with which the atenteben can be manufactured. Shakers and claves also recorded 304 and 276 per annum. Though drums are the instrument manufactured by most carvers, it takes longer time compared with the rest hence an average of 112 per annum.

- *Teaching of Music*

When asked if they also teach music as part of their occupation, exactly 50% answered in the affirmative. They teach Ghanaians and tourists how to play local music instruments and dancing.

On the average, they train 25 people a year with a maximum number of 300.

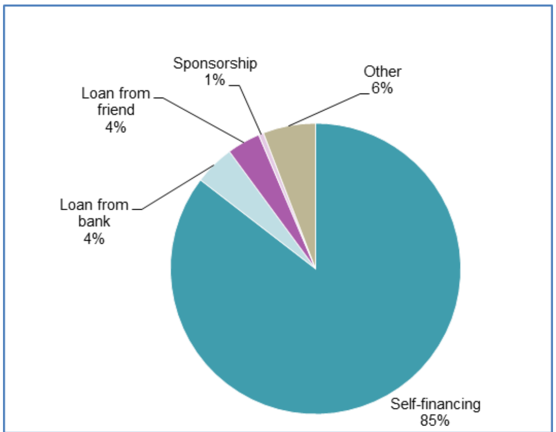
- *Other Sources of Income*

The respondents also earned income from other sources with one-fifth answering in the affirmative. This implies close to 80% earn income exclusively from carving instruments.
Of those who earn income from other sources, the greater percentage earn income from other carving activities apart from instrument manufacturing. Other sources include shoe making and guiding tourist through Accra.

- *Sources of Income*

On the sources of income, 85% finance their activities from personal funds. This is similar to the other results of the other professionals along the value chain. Loan from bank and friend represented 4% respectively while funds from sponsorship represented 1%. Other sources of income include Susu which represented 6%. This trend highlights the dire need for funding to the sector.

Figure 11.3.7 Sources of income



Source: KPMG Analysis

11.3.2 Audio/Visuals

Audio and visual manufacturers include those companies that are involved in the production of audio and video CDs either through duplication or replication. Table 11.3.1 presents a few of the companies operating in the country. The few active companies that were contacted were however reluctant to participate in the survey.

Table 11.3.1 List of some of the audio and visual manufacturers

SN	Name	Location(Region)
1	S. K. Diawuo Limited (SKD digital)	Greater Accra
2	ARN	
3	Bandex Music Center	
4	Luso Sounds Ghana Ltd	

5	MK Production Ltd	
6	Multi-Media Technology Ltd	
7	Accra Sounds & Audiovisual Ltd	
8	Super Audio Industries (Ghana) Ltd. (SAI)	
9	King-Tech Ltd	
10	NagCee	Ashanti

Source: Copyright Office

The study revealed that about eleven companies are operating but about three of them are actively engaged in CD duplication. The active ones have also diversified their activities by producing videos CDs in addition to audio. Currently, only 25% of manufacturers manufacture blank CDs. This means that most of the CDs are imported.

11.4 Digital Music Downloads

Digital music is downloaded over the internet or via the platform of a Mobile Network Operator (MNO). There are six MNOs in Ghana namely MTN, Vodafone, Tigo, Airtel, Glo and Expresso.
Websites for musical downloads in Ghana such as www.ghanamotion.com are mostly promotional websites and not websites for the sale of music. The main limitation to internet sales is the lack of appropriate online marketing infrastructure to support digital music sales. Most Ghanaians are more comfortable trading with cash and are as such not very keen on trading over the internet due to the perceived risks they associate with internet banking.

Musical downloads over the platforms of MNOs have thus been sublet to and are being managed by Content Providers. Content Providers are companies within the mobile value added services (VAS) and wireless applications market that develop, deploy, market and manage wireless/mobile applications. Their services are deployed over short message services (SMS), unstructured supplementary service data (USSD), Voice, multimedia messaging service (MMS), wireless application protocol (WAP) and general packet radio service (GPRS)/Internet.

Content providers in Ghana are licensed by the National Communications Authority and have formed an association called the Wireless Application Services Providers' Association of Ghana (WASPAG). WASPAG is a fairly young establishment which will turn a year old in December of 2013. The association was formed to ensure that wireless application service customers in Ghana receive world-class services, that industry stakeholders earn a fair return on their investments, that members work for the mutual benefit of the association and to provide a platform for addressing the concerns and complaints of the public relating to services provided by members of the association.

Membership with the association takes two main forms, full membership and associate membership. Full membership requires the existence of a WASPAG agreement with one or more of the mobile network operators. Affiliate membership is only available to companies who do not have WASPAG agreements with the networks and would thus ride on the backs of full members. Currently there are 10 full members of the association.
A list of the full members and their websites has been provided in the Table 11.4.1:

Table 11.4.1 List of full members of WASPAG

No.	Name	Websites
1.	Smsgh Solutions Ltd	http://smsgh.com/
2.	MTech Communications	http://www.mtechcomm.com/Ghana.html
3.	Rancard	http://rancardmobility.com/
4.	Mobile Content.Com Ltd	http://www.mobilecontent.com.gh/
5.	Nosmay Company Ltd	http://www.nosmay.com/
6.	TXT Ghana	http://ghana.txtunited.com/

7.	El Cuto Consult Ltd	http://www.elcutoconsult.com/
8.	Media Edge-gsm	http://www.mediaedgegsm.com/
9.	VAS2Nets	http://www.vas2nets.com/
10.	M Tiger	n/a

Source: Official WASPAG website

A service provided by content providers that is of interest to the research is the caller 'Ring Back Tune' with the acronym RBT which provides the opportunity for songs to be utilised as caller tunes on mobile networks. Expresso on the other hand does not provide a platform for the RBT service provision. A caller can download the caller tune for a fee (GH¢ 0.32) which is shared between the mobile network operator, the content provider and the artiste/musician at percentages negotiated by the various parties (after tax deductions). Market average indicates that, MNOs take 65% of the return and the remaining 35% is shared between the content providers and artistes (together with their manager(s)). The 35% is shared on a 50-50 basis between the stakeholders.

The process of getting a song utilised as an RBT can begin in any of the following ways:

- The artiste could approach the MNO and request to subscribe to the RBT. The MNO would then provide the artiste with the list of the licensed wireless service providers to choose one.
- The artiste could approach the content provider straight away or
- The content providers can chase songs which has the potential of being on high demand to subscribe them.

MNOs require content providers to sign a service contract/agreement with the artiste before they grant them access to upload songs onto their platform. For Ghanaian artistes and others who are easy to locate, such agreements are signed with them. For foreign artistes who are not easily located, such agreements are signed with GHAMRO (the artiste's percentage of the income is thus paid to GHAMRO). Content providers are given access to view the platform in order to monitor the number of downloads that their song registers at any point in time. At the end of an agreed period, mostly every quarter or half year, a cheque is issued by the content provider to the artiste, based on the number of song downloads per the period.

11.5 Event organisers and Venues

There are some events and concerts which have served as promotional platforms for the local music industry operations. Some of them are as a result of festive occasions such as Christmas, Easter, Ramadan and others also take advantages of national holidays to stage musical shows. These events may either take place at indoor environments such as the Accra International Conference Centre, National Theatre, The Dome, Large Church Auditoriums, Banquet Hall of the State house and Charter House studios. Outdoor environments include beaches, trade fair centre, stadium arena, popular streets, independence square, theatres and play parks.

Some events organized indoors in Ghana and the venues where they are popularly held are presented in the table below. Ghanaian artistes mostly feature during such shows, not withstanding, foreign artistes are also not left out.

Table 11.5.1 Popular Ghanaian indoor events

Venues	Types of events
1. Accra International Conference Centre	Ghana Music Awards, 4syte Music Video Awards, Adom Praize, Ghana Rocks Concert, Miss Malaika
2. National Theatre	Adom Praize, Vodafone Icons, Night of 1000 laughs and music
3. The Dome	Ghana Music Awards, 4syte Music Video
4. Banquet Hall (State House)	National and organizational banquets and music festivals
5. Church Auditoriums	Adom Praize

6. Television Stations	Mentor, Music Music, Lice Band Shows

Source: KPMG Research and Analysis

Other events are organized outdoors in an open air area. Examples of such events and their venues are listed below.

Table 11.5.2 Popular outdoor events

Venues	Types of events
1. University Botanical Gardens	Joy FM annual family fun park, Organizations' out-of-office fun day
2. Efua Sutherland Park	Children Fun games and music
3. Trade Fair Centre	Joy FM annual school reunion, Salsa fiesta
4. University Campuses	Music artiste nights of annual hall week celebrations
5. Beaches	Beach parties, Musical concerts
6. Popular streets	Street Carnivals e.g. Osu street carnival during Christmas, Obomeng street Carnival at Kwahu during the Easter festivities, James Town's popular Chale Watte and Nima street carnival during Salafest of Ramadam.
7. Stadium arena	Both gospel and circular concerts that expect large number of audiences.
8. Independence square	State functions ,Gospel Musical concert, Women Aglow nationwide meetings

Source: KPMG Research and Analysis

Other international events which feature some Ghanaian artistes include the Black Entertainment Television (BET) Awards, Channel O music awards, Music Television (MTV) awards and MTV base awards.

Even though there is no official list, there are a number of event organisers in Ghana who organise both public and corporate events. Some of these event organisers hold public events, however they are mostly one offs and do not attract a lot of audience.

With regards to consistency in organising public music events, Charter House is at the forefront. They have been holding annual events targeted at the general public since their establishment in 2000. They have succeeded in making such annual events recognisable on the Ghanaian social calendar such that they have become some of the, if not the most sought after shows of the year. The premier annual flagship event is 'the Ghana Music Awards' (GMA), which has become the nation's topmost annual recognition event for musicians and players of that industry. The conceptualisation, planning, promotion and production of the event are implemented in phases; the launch, the nominees jam, the industry awards and the main event – the music awards.
Another recognizable annual event is 'the Ghana Rocks', which is organised December of each year. There is also a comedy show which is organised twice in each year, 'the Night of 1000 laughs and music'. This also features some musicians but it is a flagship comedy show.
They also organise corporate events which also feature musicians. Corporate events take the shape of seminars, conferences, product launches, parties (end of year) and awards services (banking awards) among others.

Another event organiser that shows consistency with organising public events is Empire Entertainment. They organise the annual 'Ghana meets Naija' show.
Fees to be paid to artistes who are featured to perform on such shows are mostly based the perceived market value of the artiste, popularity of the artiste and his/her music and the demand that is placed on the artistes song by the general public. Artistes performing on shows receive an average amount between GH¢5,000 and GH¢6,000. Artistes at the peak of their careers receive an average range between GH¢20,000 and GH¢25,000 (Note: extremely few artistes earn such an amount per show).

Organisation of such events provides employment to several other persons/professionals including set designers, lighting technicians, stage designers, electricians, camera crew, security men, ushers, caterers, studio engineers, makeup artists, fashion designers, etc.

11.5.1 Data analysis – Event organisers

- *Years of operation*

Most event organisers (75%) have been operating in the industry between the past five and fifteen years. 25% of them have operated for less than 5 years.

- *Number of persons employed*

The event organising category has been divided into four equal parts as far as numbers of employees are concerned. The numbers are in the following four categories, less than 5, between 6 and 10, between 11 and 15 and over 15. We observed that 25% of them belonged to each of the categories.

- *Professional status, Base of operations and Awards*

We observed that, 75% of event organisers operate on full time basis. They also operate from Ghana and have received awards in their career. On the other hand, 25% of them operate on part time basis, operate from both Ghana and abroad and have not received awards in their career before

- *Other sources of income*

Exactly 50% of the event organisers have other sources of income and 25% of them do not, another 25% of them did not respond to this question.

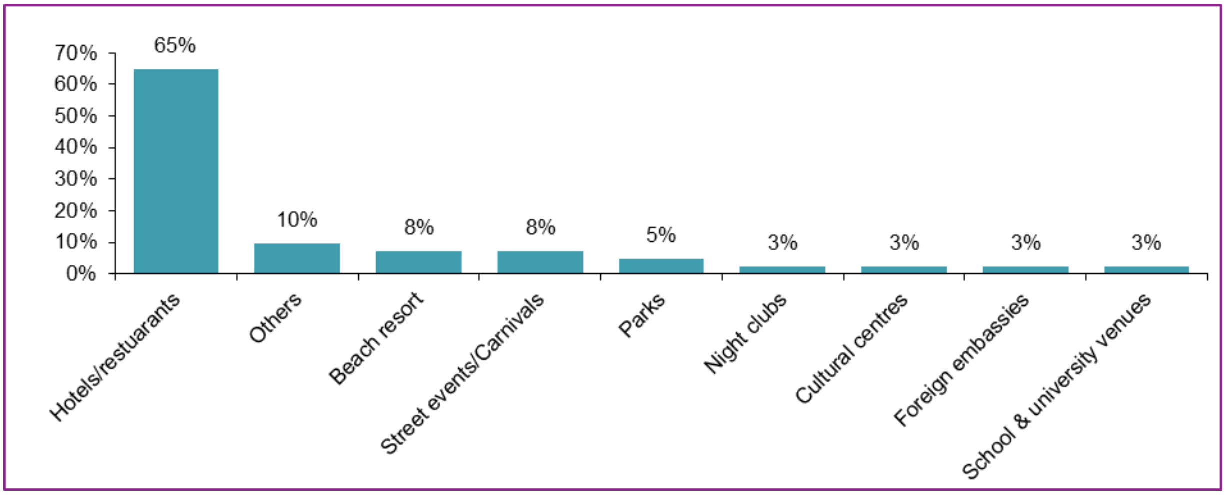
11.5.2 Data analysis – Venue operators

Operators of restaurants, hotels, beach resorts, parks, night clubs, cultural centres and embassies were interviewed during the survey. Venues situated in schools and universities were also included in the study. The survey sought to examine how best venue operators promote Ghanaian music. Below are the findings.

- *Venues Operated*

From the survey, 65% of the interviewees operate hotels/restaurants, 8% operate beach resorts and street carnivals also make 8%. Operators of parks made up 5% of the interviewees and night clubs, cultural centres, foreign embassies and schools made up 3% each. 10% of the interviewees are into other operations like pubs and bars.

Figure 11.5.1 Types of venues operated

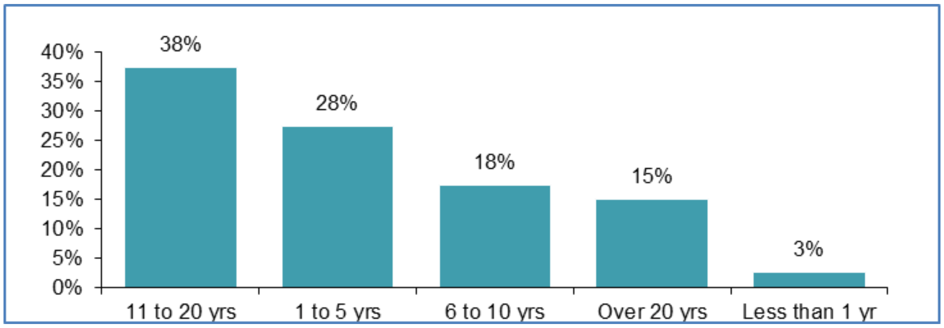


Source: KPMG Analysis

- *Years of Operation*

The study sought to examine how long venues have been in operation and it was observed that most of the venue operators interviewed have been in the profession for long. 38% have been operating for 11 to 20 years whiles 28% have been in the business for 1 to 5 years. The study also showed that 18% have been operating for 6 to 10 years and the longest year of operation of over 20 years made up 15%. The remaining 3% have been operating for less than a year.

Figure 11.5.2 Duration of business operations



Source: KPMG Analysis

Table 11.5.3 shows the individual venues and the years of operation. 20% of interviewees operating night clubs have been in the business for 1 to 5 years, 60% for 11 to 20 years and the remaining 20% for over 20 years. All operators of beach resort interviewed have been operating for 11 to 20 years and 100% of cultural centre and street event operators sampled have been in the business between 1 to 5 years. All operators of schools and university venues interviewed have not obtained license from GHAMRO. For hotel/restaurant operators 4% have been operating for less than a year, 19% for 1 to 5 years, 19% for 6 to 10 years, 39% for 11 to 20 years and 19% for over 20 years. Other operators like pub and bar operators have 75% operating for 11 to 20 years and the remaining 25% for 1 to 5 years.

Figure 11.5.3 Years of business operations according to the types of venues

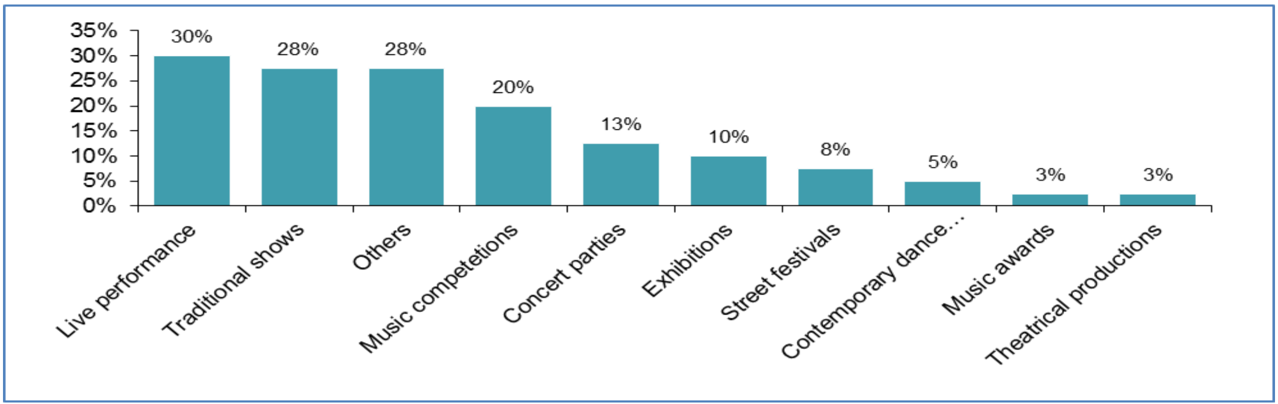
Venue	Years of Operation				
	Less than 1 year	**1 to 5 years**	**6 to 10 years**	**11 to 20 years**	**Over 20 years**
Night club	0%	20%	0%	60%	20%
Beach resort	0%	0%	0%	100%	0%
Cultural centres	0%	100%	0%	0%	0%
Street events/carnivals	0%	100%	0%	0%	0%
School and university venues and grounds	0%	0%	0%	0%	100%
Hotel/Restaurant	4%	19%	19%	39%	19%
Others	0%	25%	0%	75%	0%

Source: KPMG Analysis

- *Shows Organized*

The various shows organized are live performances, traditional shows, music competitions, concert parties, exhibitions, street festivals, contemporary dance shows, music awards and theatrical productions during the year. 30% of responses organize live performances followed by traditional shows which represented 28%. Music competitions made up 20%, concert parties 13%, exhibitions 10%, street festivals 8% and contemporary dance shows 5%. The least number of shows organized are music awards and theatrical productions which made up 3% each.

Figure 11.5.4 Types of shows organised



Source: KPMG Analysis

- *Commercial Activities*

A bigger percentage of the shows organized are commercial, thus 88% of interviewees have 10% or more of shows organized at their venues being commercial. 40% responded that 100% of shows are commercial, 10% said 80% of the shows are commercial, 18% answered that 70% of shows are commercial and 5% responded 60% of the shows are commercial. On the average, 81% of interviewees have 40% to 100% of shows organized at their venue being commercial. 12% did not answer to this question.

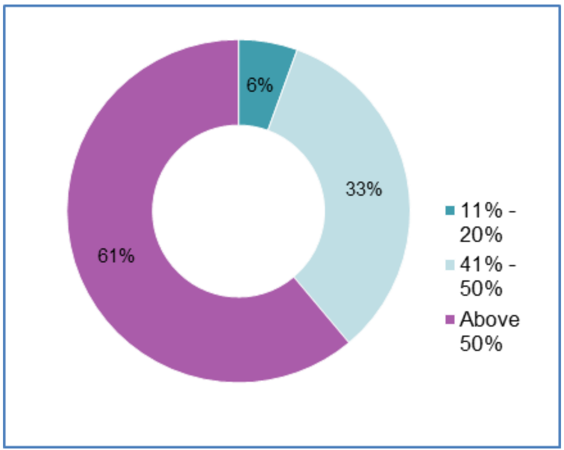
- *Equipments*

75% of venue operators interviewed have already fitted equipments and the remaining 25% do not have equipments thus they hire.

- *Audience*

The venues receive more Ghanaian audience than foreigners. 50% of interviewees receive Ghanaian audience only during shows at the venues, 45% receive a mixture of Ghanaian and foreign tourists and 2% receive foreign tourist only. The remaining 3% of interviewees did not respond to this question. Out of the 45% that receives a mixture of Ghanaian and foreign tourists, 61% have over 50% of the audience being Ghanaian, 33% receive about 41% to 50% of Ghanaian audience and only 6% receive 11% to 20% of Ghanaians.

Figure 11.5.5 Proportion of Ghanaians to Foreigners who visit venues



Source: KPMG Analysis

12 International Dynamics

12.1 Ghanaian music abroad

Ghanaian music has received patronage from foreigners as well as Ghanaians living in the Diasporas. Popular genres that are easily patronized by foreign consumers include hip-life, reggae, gospel, highlife and afro beat music.

12.1.1 Live performances

A growing source of income is live performance by musicians also known as gigs. We observed from our analyses that, 80% of musicians perform live shows with the rest (20%) not putting up any live shows at all. On the average, a musician performs 20 shows in a year in Ghana. Out of those who perform live shows abroad, the average number of performances is 6 per year. Reasons why musicians do not perform live shows include the lack of opportunities to perform and the fact that some of them do not have managers and promoters to arrange shows for them.

12.1.2 International awards

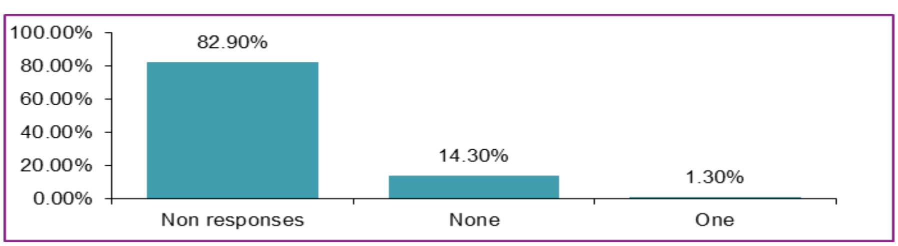
Some Ghanaian artistes have received nominations to world renowned music awards festivals. Examples have been the outstanding performances of the once famous Osibisa group in the 1920’s and the winner of last years Ghana Music Awards, Sarkodie, who was nominated for and won the award of “best international act (Africa)” at the 2012 BET (Black Entertainment Television) awards night in the prestigious Nokia Theatre in Los Angeles. The duo, R2Bees, was nominated for the same category of award at the just ended 2013 awards night. They however lost out to the Nigerian artist Ice Prince.
Out of 445 musicians who were interviewed, 82.9% failed to answer whether they had ever won any international award in their career. 14.3% indicated that they had not won any international award in their career and 1.3% indicated that, they had won one international award (details are summarized in the Table 12.1.1 and Figure 12.1.1).

Table 12.1.1 International awards won by performers

International awards won			
Number	**Frequency**	**Percent**	**Valid Percent**
Non responses	369	82.9	
None	63	14.3	83
One	6	1.3	7.9
Two	3	0.7	3.9
Three	2	0.4	2.6
Four	1	0.2	1.3
Nine	1	0.2	1.3
Total	**445**	**100**	**100**

Source: KPMG Analysis

Figure 12.1.1 Number of international awards received

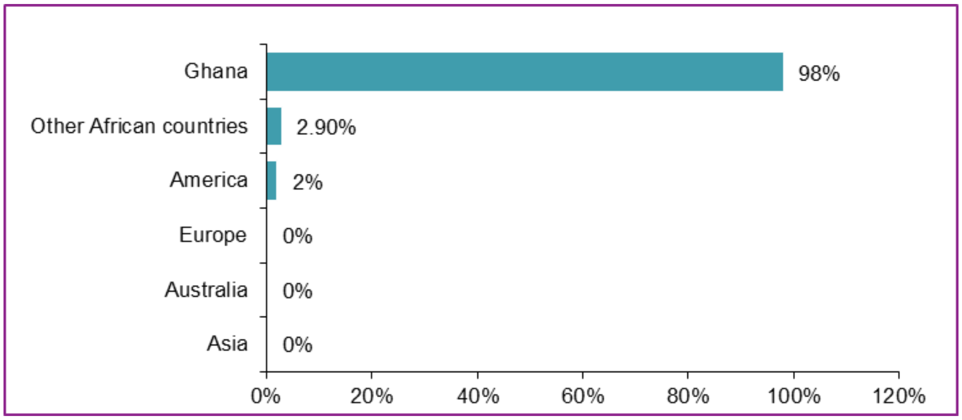


Source: KPMG Analysis

12.1.3 Operational base of music distributors

Ghanaian music is mainly distributed by music distributors. The base of operations of the distributors were found be mainly in Ghana (98% of distributors). There are some whose operations are based in other African countries and in America, these forms 2.9% and 2% respectively. Those based overseas indicated that they work abroad because they have a better organised music industry. They also indicated that there is easy access to financial support, access to a larger market and higher returns on investments. There are none whose operations are based in Asia, Australia and Europe according to our research.

Figure 12.1.2 Base of business operations



Source: KPMG Analysis

12.2 Exposure of tourists to Ghanaian music

In this study we also sought to examine the interest of tourists in music and the role they play in the industry. Our findings and analyses are present below along with some charts.

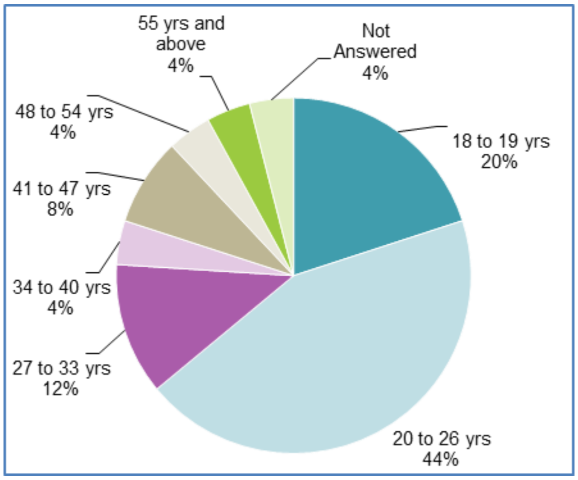
- *Gender*

A greater percentage of tourists interviewed are males. 68% of the tourists are males and the remaining 32% are females.

- *Age*

Most of the tourist interviewed are between the ages of 20 to 26 years. 44% of interviewees fall within this age bracket followed by 13 to 19 years which makes up 20%, 27 to 33 years is 12% and 41 to 47 years make up 8%. Tourist between the ages of 34 to 40 years, 48 to 54 years and 55 year and above make up 4% each. 4% of interviewees did not answer.

Figure 12.2.1 Age distribution of tourists

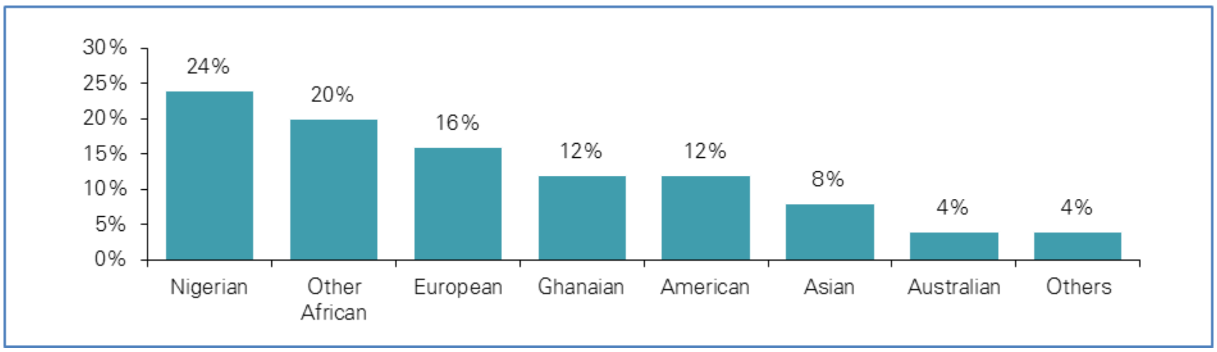


Source: KPMG Analysis

- *Country of origin*

From the tourists sampled, 24% were Nigerians, 20% are from other African countries and 16% are Europeans. Non resident Ghanaian tourist and American tourists make up 12% each followed by Asians which make up 8%. Australians and other tourists make up the least number of 4% each.

Figure 12.2.2 Country of origin of tourists



Source: KPMG Analysis

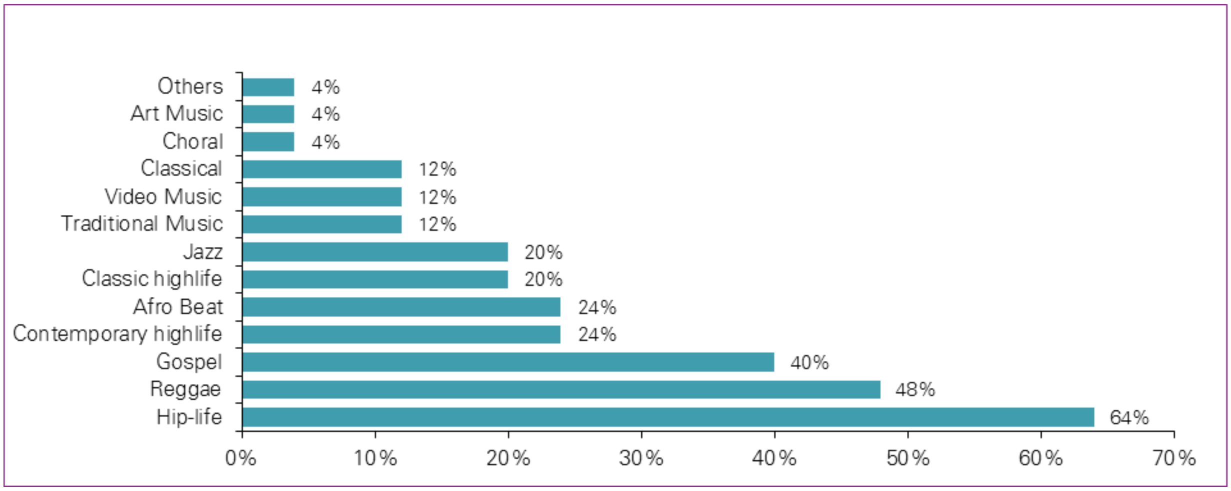
- *Geographical location*

Out of the ten regions tourist were interviewed from six regions, Greater Accra, Ashanti, Brong Ahafo, Northern, Eastern and Volta regions. Greater Accra recorded the highest number of 28% followed by Ashanti, Brong Ahafo, and Northern regions which make up 16% each. Eastern and Volta regions had the least number of tourist of 12% each.

- *Genres preferred*

All the interviewees stated that they enjoy Ghanaian music. Hip-life is the most preferred genre by tourist interviewed. It makes up 64% followed by reggae music which makes up 48% and gospel music is preferred by 40% of tourist interviewed. Contemporary highlife and afro beat is preferred by 24% each. Classic highlife and jazz is preferred by 20% each whilst traditional, video and classical music make up 12% each of tourist. The least preferred genres, choral music, art music and others make up 4% each of the tourist interviewed.

Figure 12.2.3 Preferred genres by tourists

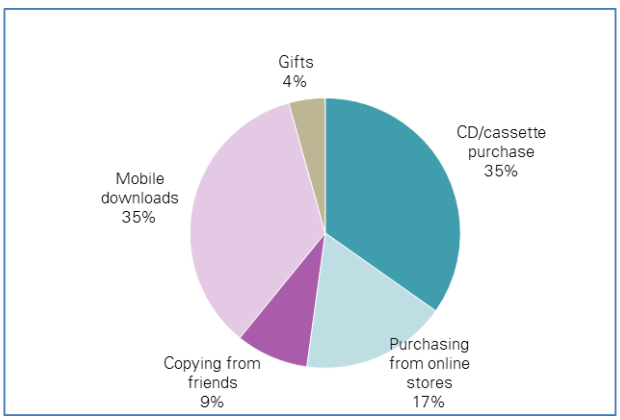


Source: KPMG Analysis

- *Ways of acquiring music*

Mobile downloads and the purchases of CDs are used by 35% of tourists interviewed to acquire music followed by online purchases which makes up 17% of the tourists. 9% and 4% of tourists acquire music by copying from friends and gifts respectively.

Figure 12.2.4 Mode of acquiring music



Source: KPMG Analysis

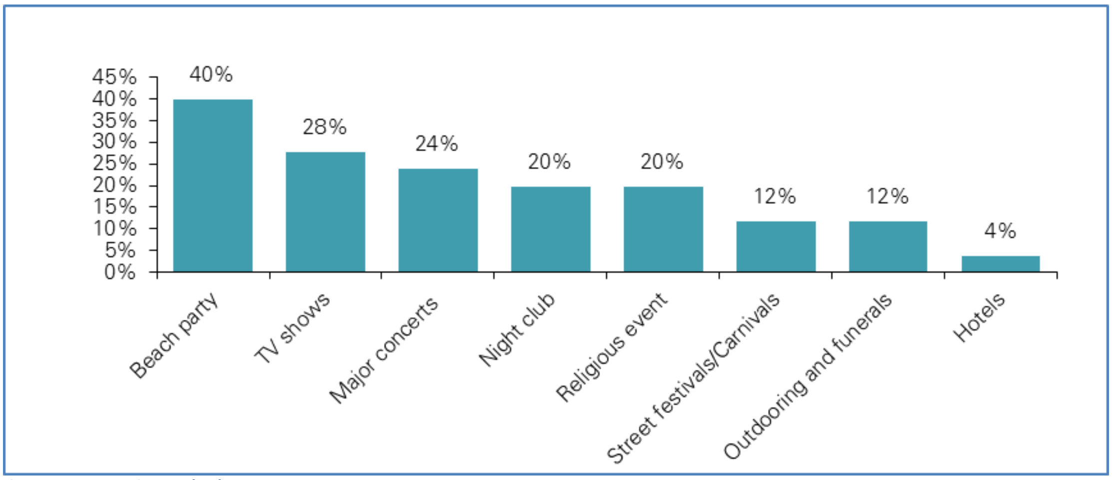
- *Live shows*

A greater percentage of the tourists sampled do not attend live shows. Thus, 52% do not attend live shows and the remaining 48% attend live shows.

- *Preferred show*

Beach party is the most preferred show by the tourist interviewed. 40% of tourists prefer beach parties followed by 28% who prefer TV shows and 24% prefer major concert like music awards. Night clubs and religious events are preferred by 20% each of tourists interviewed, 12% prefer street carnivals and 12% also prefer outdoorings and funerals. Shows hosted in hotels are the least preferred and it makes up only 4% of the tourists interviewed.

Figure 12.2.5 Types of shows preferred by tourists



Source: KPMG Analysis

- *Education in music*

Most of the tourists interviewed do not intend acquiring any form of education in music. Thus 84% do not want to be educated in music and 16% would like to obtain education in music.

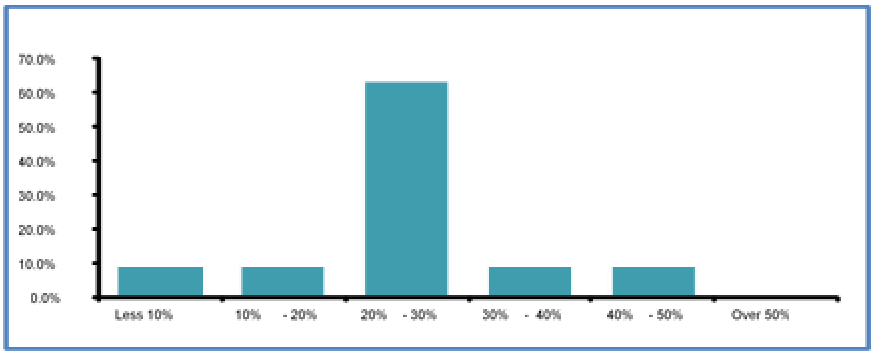
12.3 Volume of Exports

Apart from performing live shows and selling Ghanaian music to the world market, there are other means by which Ghanaian music and other musical artefacts are exported to other countries. These include the sale of traditionally made musical instruments such as drums, xylophones, rattles, gongs etc to countries such as United States, Germany, Netherlands and the United Kingdom.

- *Market focus of Ghanaian music producers*

The following charts present the percentage of producers who export their music and the percentage of products exported.
We observed that, 80% do not export their products but focus mainly on the Ghanaian market. The remaining 20% export their products with 64% exporting between 20% and 30%of their products. This shows the limited reach of the Ghanaian music abroad.

Figure 12.3.1 Percentage of music export



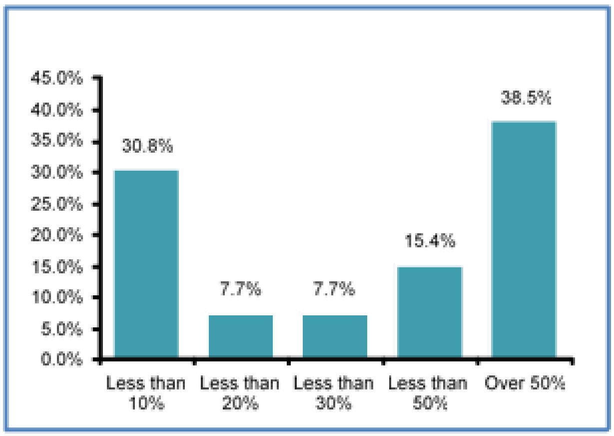
Source: KPMG Analysis

- *Market focus of local instrument manufacturers*

The study found out the percentage of carvers who export products and the proportion of production that is exported.

Majority of respondents (54%) sell their products to the local market with the remaining 46% exporting some of their products. Out of those who export their products over one-third export more than 50% of their products while majority exports less. This implies that the local market is the major focus for the carvers.

Figure 12.3.2 Export component of production



Source: KPMG Analysis

13 Linkage with other Sectors

13.1 Music as a subject – Musicology

The scholarly study of music is generally termed Musicology. The disciplinary neighbours of musicology address other forms of art, performance, ritual and communication including the history and theory of the visual and plastic arts and of architecture, linguistics; literature and theatre; religion and theology; and sport.

Musicology as a discipline has many parent disciplines including history; cultural studies and gender studies; philosophy, aesthetics and semiotics; ethnology and cultural anthropology; archaeology and prehistory; psychology and sociology; physiology and neuroscience; acoustics and psychoacoustics; and computer/information sciences and mathematics.

Two central, practically oriented sub-disciplines with no parent disciplines are performance practice and research; and the theory, analysis and composition of music. Traditionally, historical musicology has been considered the largest and most important sub-discipline of musicology. Today, historical musicology is one of several large sub-disciplines. Historical musicology, ethnomusicology, and systematic musicology are approximately equal in size considering active participants at international conferences. Systematic musicology includes music acoustics, the science and technology of acoustical musical instruments, physiology, psychology, sociology, philosophy and computing.

Music psychology, or the psychology of music, may be regarded as a branch of psychology or a branch of musicology. It aims to explain and understand musical behaviour and musical experience. Modern music psychology is mainly empirical: music-psychological knowledge tends to advance primarily on the basis of interpretations of data about musical behaviour and experience, which are collected by systematic observation of and interaction with human participants. Music psychology is a field of research with practical relevance for music performance, music composition, music education, music medicine, and music therapy.

Cognitive Musicology is the set of phenomena surrounding the computational modelling of music. The field of music cognition involves the study of many aspects of music, including how it is processed by listeners. Much research in music cognition seeks instead to uncover the mental processes that underlie these practices. Also, research in the field seeks to uncover commonalities between the musical traditions of disparate cultures and possible cognitive "constraints" that limit these musical systems. Questions regarding musical innateness and emotional responses to music are also major areas of research in the field.

Cognitive neuroscience of music is the scientific study of brain-based mechanisms involved in the cognitive processes underlying music. These behaviours include music listening, performing, composing, reading, writing, and ancillary activities. It also is increasingly concerned with the brain basis for musical aesthetics and musical emotion. Scientists working in this field may have training in cognitive neuroscience, neurology, neuroanatomy, psychology, music theory, computer science, and other allied fields.

13.2 Music as an art – Applied Musicology

Within the arts, music may be classified as a performing art, a fine art, and auditory art. It may also be divided among art music and folk music. Throughout the decades music has inspired various aspects of life. It has been the centre of inspiration for sculptures, drawings, and paintings. Music has also been incorporated into movies, television shows, documentaries, commercials and short videos. It is evident in today’s society that music holds an important role in numerous art styles. Musical knowledge and know-how are applied in various fields including medicine, education, fashion, film, theatre art and therapy.

13.2.1 Film

Music in films/movies is an important part of the filmmaking process and is one of the factors that determine movie success or failure across the movie industry. Film music has the ability to expose the feelings and actions of characters and to amplify the expression of the tension and suspense present in a movie. The concept of using music to illuminate characters' qualities maybe the most overlooked, but one of the most important roles music plays in film making. The need to know what type of music to use for what type of movie is important. It is as well necessary to identify what the music intends to accomplish. Acquisition of license for the music and how much one will earn from the use of it is also important.

A score/underscore is a category of film music. It is what many people think of when they imagine music in films. Underscores are usually composed for an orchestra of various sizes to perform, however, many are now also written for electronic music and MIDI sequence as well. A film score (also sometimes called film music, background music or incidental music) is original music written specifically to accompany a film and forms part of the film's soundtrack, which also usually includes dialogue and sound effects, and comprises a number of orchestral, instrumental or choral pieces called cues which are timed to begin and end at specific points during the film in order to enhance the dramatic narrative and the emotional impact of the scene in question. Scores are written by one or more composers, under the guidance of or in collaboration with, the film's director and/or producer and are then usually performed by an ensemble of musicians – most often comprising an orchestra or band, instrumental soloists, and choir or vocalists – and recorded by a sound engineer.

Film scores encompass an enormous variety of styles of music, depending on the nature of the films they accompany.

The pre-existing song, another category of film music is simply a song that is already written and is often already familiar to the public. It is common for a director or writer to use a song because they imagine it playing during specific scenes while writing and shooting or they feel that it will set the perfect mood for the shot.

When a song is used in a film it is not only performed but also reproduced in copies. These are rights that come exclusively with copyright ownership. The film producer must obtain the proper licensing to use a song in an audio/visual production. This involves two separate copyrights: one for the underlying music which is owned by the publisher and one in the specific recording of the music, which is owned by the record company. A synchronization license covers the right to use the music, and a master recording license covers the use of the music. Because films are made to be reproduced, the filmmaker must obtain both.

The Management of the National Film and Television Institute (NAFTI) together with Executives and representatives of the Musicians Union of Ghana (MUSIGA) held discussions on the establishment of a Music Recording Department at NAFTI intended to lead to the award of a Bachelor of Arts Degree in Music Production. Courses to be offered include Music Theory, Music and Sound Engineering, Composition and Performance, and African music and performance. NAFTI is in the process of being transformed into a Media and Creative Arts University to cater for the professional skills development of the Creative Arts Industry. The new MUSIGA department of music production is expected to be operational by September 2014.

13.2.2 Theatre art

Theatre is a collaborative form of fine art that uses live performers to present the experience of a real or imagined event before a live audience in a specific place. The performers may communicate this experience to the audience through combinations of gesture, speech, song, music, and dance. Elements of design and stagecraft are used to enhance the physicality, presence and immediacy of the experience. Theatre today includes performances of plays and musicals, although it can be defined broadly to include opera and ballet.

African theatre is concerned almost exclusively with live performances in which the action is precisely planned to create a coherent and significant sense of drama, as it is presented in sub-Sahara Africa.

The content and style of urban African theatre are influenced by both African dramatic traditions and Western theatre. The influence of Western styles is the result of a colonial presence, education in European languages, and the training of artists abroad.

On the other hand, at a popular level, village theatre throughout Africa is based on the traditions of music, song, dance and spectacle and has offered a rich platform for the development of contemporary urban theatre. Theatre innovators built onto village traditions of storytelling, some borrowing production styles from the colonial music-hall entertainment staged in West African cities in the 1920s and 1930s. Concert parties toured Togo and Ghana, and in the 1950s the Ghanaian "Trios" emerged, with Bob Cole and his company delighting audiences in Accra with comic dramatizations of local events.

Having music in theatre can make the play more effective and reach out to the audience or community in a way so personal that individuals will be able to connect to the play and better understand it by all means. Theatre music refers to a wide range of music composed or adapted for performance in theatres. Genres of theatre music include opera, ballet and several forms of musical theatre, from pantomime to operetta and modern stage musicals and revues. Another form of theatre music is incidental music, which, as in radio, film and television, is used to accompany the action or to separate the scenes of a play. The physical embodiment of the music is called a score, which includes the music and if there are lyrics, it also shows the lyrics.

Theatre and arts groups/ programmes in Ghana include the:

- Academy of African Music and Art with highly-skilled teachers who are all members of the world-famous Obonu-Royal-Drum of Ghana group which have international experience.

- Abibigromma, the resident theatre group of the School of Performing Arts, University of Ghana

- Dagara Music and Art Centre, offering programmes at the elementary, college and university levels.

13.2.3 Fashion

The link between fashion and music has always existed, but was not always accorded any great importance. Throughout different periods in history, fashion has been identified with different genres of music. It is enough to think about a musical style, and you find yourself associating it with a style of clothing. The link between fashion and music has gone hand in hand since the Medieval, Renaissance and Baroque periods which, along with its characteristic church music, represent the elegant look as being somewhat pale and bloated.

Looking back at the 1960s, society believed music was something promoting love and peace. The fashion was hippie style, consisting of flowing dresses and bell-bottom pants. Then in the 1970s there was the disco era with polyester suits, silk shirts, and elevator shoes. The 1980s brought the punk rock music phase; the common fashion style for women of that era was dressing in colourful clothes with fishnet stockings on their legs, arms and in their hair. The common fashion style for men of the 1980s included big hair, spandex, and more make-up than the women wore. As the decades transitioned, music and fashion trends changed with them.

The youth of the world go through numerous phases of fashion styles. A majority of those fashions fit together with different music styles. It is believed that people are likely to see a favoured musician wearing something they like and then incorporate it into their own style of clothing.

Although fashion choices receive much influence from music, people of today are not as heavily influenced as previous generations had been.

Now, more than ever, we are starting to see musicians take their talents to new places. Going beyond just being a spokesperson or face of a brand, a lot of the favoured rappers and singers crossover into the fashion industry. Examples include Kanye West whose clothing line is called A.P.C., Rihanna whose clothing line is called River Island, Nicki Minaj (clothing line; Kmart) and Taylor Swift (clothing line; Keds).

In Ghana, musicians are not exempted from these changing trends. Ghana's fastest rapper, Sarkodie, has officially launched his clothing line, Sark, designed by Yas. The clothing line is the song writer's way of getting closer to his fans.
The C.E.O. of Black Avenue Music and one time BET Award nominee Desmond Blackmore known as D Black will launch his clothing line in November 2013. The materials will include hoodies, snap backs, wrist bangles and many others.
Like any creative industry, music finds innovative ways of surviving and thriving through collaboration. The most obvious manifestation of the collaborative spirit can be found in catwalk shows. In most instances, the perfect song has the power to convey the aesthetic of a designer’s work in ways which presenting the collection on its own cannot.
In recent years, however, the tradition has been, literally, amplified. Live music is adding to the glamour and spectacle of runway. The shows of many major fashion houses now seem like concerts.
Examples of fashion shows organized in Ghana include GLITZ Africa Fashion Week at the Accra International Conference Centre, Ghana Fashion and Design Week and the annual fashion shows of some polytechnics like the Accra Polytechnic.

13.2.4 Medicine & therapy

Music boosts the body's immune system and is more effective than prescription drugs in reducing anxiety before a surgery. Music has effects on brain chemistry and associated mental and physical health benefits in the management of mood, stress reduction, boosting immunity and as an aid to social bonding. Older adults can also boost their immune function, reversing age-related declines, by making music as participants in drumming circles.

The positive effects of music seem to be linked to the fact that music causes neurons in the brain stem, a primitive part of the brain, to be activated in sync with the beat. This has a cascade of chemical effects on the nervous system, typically evoking relaxation if the beat is slow and improving focus and alertness if the beat is faster. Studies showed that slower music tends to be more relaxing than faster music, but familiar music is more relaxing, regardless of the type and tempo.

So far, most of the evidence on health impacts of music caused by neurochemical changes is indirect, but taken together it does provide preliminary support.

Music therapy is an interpersonal process in which a therapist uses music and all of its facets—physical, emotional, mental, social, aesthetic, and spiritual—to help clients to improve or maintain their health. In some instances, the client's needs are addressed directly through music; in others they are addressed through the relationships that develop between the client and therapist. Music therapy is used with individuals of all ages and with a variety of conditions, including: psychiatric disorders (mental illness, schizophrenia etc), medical problems, physical handicaps, sensory impairments, developmental disabilities, substance abuse, communication disorders, interpersonal problems, and aging. It is also used to: improve learning, build self-esteem, reduce stress, support physical exercise, and facilitate a host of other health-related activities.

Currently music therapy is practiced in USA, Great Britain, South Africa, Canada, Australia, Korea, Cyprus, Brazil, Germany, Finland, and many other countries and is a growing field. In these countries music therapy is practiced in schools, nursing homes, hospitals, community centres, rehabilitation centres and other places among populations such as infants: premature infants and full birth infants, typical and special needs children population groups with various disabilities and impairments, young adults and the elderly.

Music therapy in Ghana is in its embryonic stage at the moment and the biggest challenge is educating the public about music therapy. The Music Philanthropy/Camerata Philadelphia Incorporated is planning to undertake a music therapy project at the New Horizon Special School in Ghana from December 2013 to January 2014. This Ghana music therapy project will provide an opportunity for special needs children and adults to increase and enhance their skills in language, appropriate social behaviour, music instrumental playing, and many other areas. Additionally, this project will bring an awareness of the benefits of music therapy to Ghana and West Africa at-large. The music therapy project would be the first step in the process of establishing the Ghana Music

Therapy Association, and ultimately lead and champion the course of music therapy in Ghana and other African countries.

14 SWOT Analysis

14.1 Introduction

SWOT analysis identifies favourable and unfavourable factors that influence the development of the music sector. Table 14.1.1 presents the identified factors. The analysis has been conducted based on the interviews conducted and the results and findings from the questionnaires that were administered and analysed. Also the survey of musicians and producers sought to ascertain the seriousness of the weaknesses. External factors were identified based on the situational analysis of the sector.

Table 14.1.1 SWOT analysis

Internal Factors	
Strengths	**Weaknesses**
• Legislation for the sector • Talented pool of musicians • Strong traditional music sub-sector • Availability of market for music products • Developed broadcasting service	• Piracy • Payola issues • Lack of proper regulatory framework • Lack of unity in the industry • Limited access to finance • Limited access to music equipment and instruments • Lack of technology • Weak enforcement of copyright laws • Absence of music in basic education curriculum • Lack of technical manpower/skilled capacity • Lack of venues purposely designed to hold music events • Inadequate export promotion services
External Factors	
Opportunities	**Threats**
• Proposed Arts Council to be set up • Development of the National Intellectual Property Policy and Strategy • Recognition of the creative arts with the Creation of a Ministry • Council for Creative Industries to be set up under GSGDA • Government funding for the sector	• Technological advancement in music recording • Music from other jurisdictions • Brain drain of musicians

Source: KPMG Analysis

14.2 Strengths

Existence of Legislation

There are several legislations enacted to regulate the sector. These include the Copyright Act 2005 (Act 690) (Amended in 2009) and Copyright Regulations 2010 (LI 1962). These legislations make provision for the creation of a Copyright Office for the administration of rights in music. The legislations also provide for the setting up of a collective management society to collect and distribute royalties to its members. Currently, the Ghana Music Rights Organization has been set up as the collecting body for musicians and producers.

The legislations also provide a framework for the monitoring of piracy by establishing a Monitoring Team. However, the team has not been effective in fighting the piracy menace.

Talented Pool of Musicians

The sector boasts of a pool of talented professionals within the value chain. This includes young artistes creating various genres. This pool of talents is mostly found within the churches where they have access to instruments they can practice with. The natural abilities of these young artistes have been the driving factors keeping them in the sector.

Strong Traditional Sub-Sector

The sector is strongly supported by the traditional sub-sector with each region having its unique music features. The traditional music is the foundation of the folkloric music which preserves the traditions of the people. Traditional music is built in the cultural practices of the different ethnic groups in the country. The sub-sector is also supported by the manufacture of indigenous musical instruments for use in Ghana and for export.

Availability of Market

The Ghanaian music sector has a huge local market made up of individual music fans, venue operators and growing media. Individual music fans constitute a large proportion of music users in the country. This comes in the form of the purchase CDs and also attendance to music shows. The survey revealed that 97% of the individuals interviewed liked Ghanaian music. Venue operators such as hotels, night clubs and beaches also constitute a significant proportion of the market for music. The media especially the radio and television stations have grown over the years to become heavy users of music as content. The survey of 93 radio and television stations revealed that Ghanaian music constitutes 64% of the playing of music. This channel creates opportunities for musicians to receive royalties.

14.3 Weaknesses

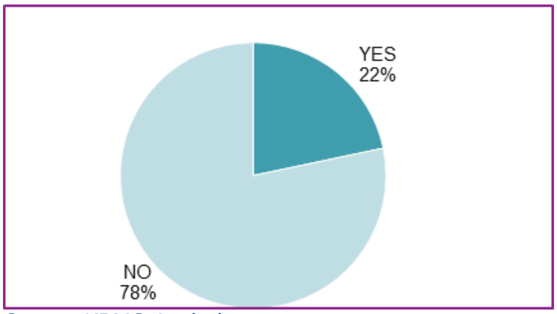
Piracy

Piracy has threatened the very existence of the music industry over the last few decades. Piracy has evolved from duplicating CDs and cassettes and selling cheaply on the open market to uploading songs and duplicating on removable storage devices. The activities of pirates threaten the industry's existence because substandard products are put out on the market for consumers to purchase. This makes products of musicians appear to be of poor quality to the outside market. Also pirates deny the authors their economic and moral rights protected under the copyright laws of Ghana.

- *Piracy among Ghanaian consumers*

Our research considered two hundred and thirty (230) Ghanaian consumers. On the whole, 180 of them, representing 78% do not acquire pirated copies of music products. 22% of them admit that they purchase pirated copies of music products as indicated in the charts.

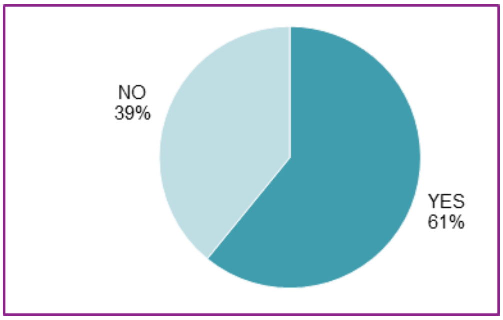
Figure 14.3.1 Proportion of Ghanaian consumers who purchase pirated products



Source: KPMG Analysis

We observed that 61% of consumers (that is 140 consumers) claim they know the difference between pirated and original copies of music products. 39% on the other hand have no knowledge of the difference between the two. This is a rather significant percentage of consumers with no knowledge about pirated music. It thus poses a risk to the industry as all such consumers are likely to fall prey to buying pirated copies of music products. This will siphon revenue which would otherwise have been generated by rightful owners, elsewhere to pirates.

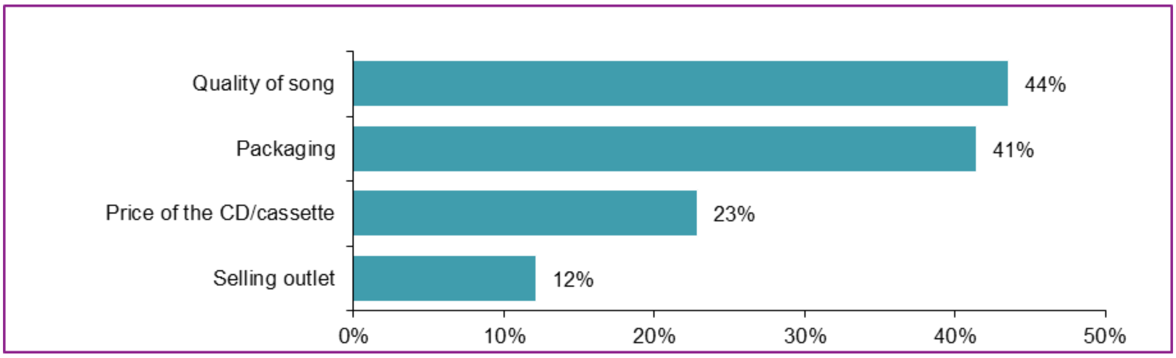
Figure 14.3.2 Proportion of Ghanaian consumers who know difference between pirated and original copies of music products



Source: KPMG Analysis

Among those who claim to have knowledge of the differences between pirated and original copies of the music products, we observed that, 44% identified pirated copies based on the quality of songs on the products. 41% identified them based on the nature of the packaging of the music products. 23% identify it based on the price of the CD/cassette and 12% based on the nature of the selling outlet.

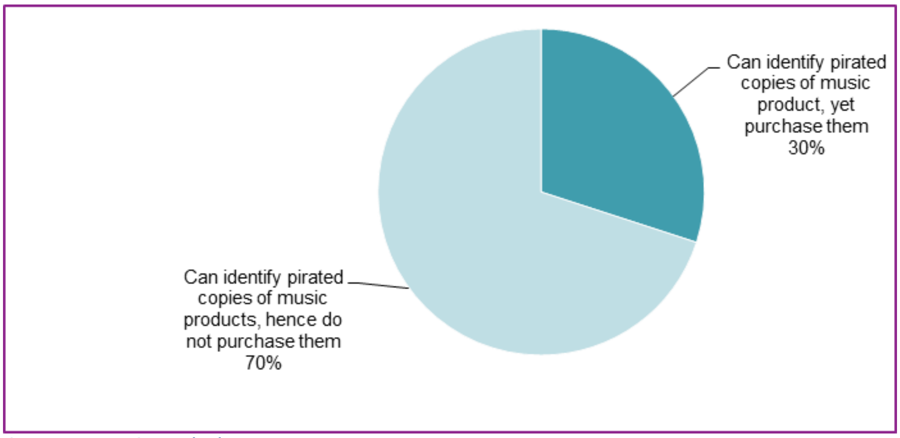
Figure 14.3.3 How pirated copies are identified by consumers



Source: KPMG Analysis

Out of the total number of consumers (140 respondents) who have knowledge about pirated copies of the music products, 42 respondents, representing 30% still purchase pirated copies of music products, presumably due to the low costs of pirated products. The remaining 98 respondents representing 70% of them do not purchase pirated copies of music product because they are able to identify pirated copies.

Figure 14.3.4 Proportion who purchase pirated music products depsite knowledge of it

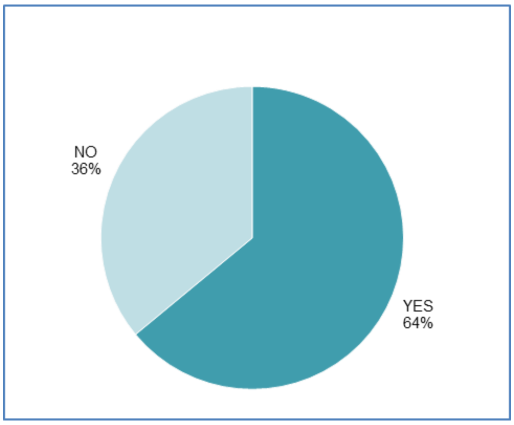


Source: KPMG Analysis

- *Piracy among Tourists (non-resident Ghanaian nationals and foreign national's tourists)*

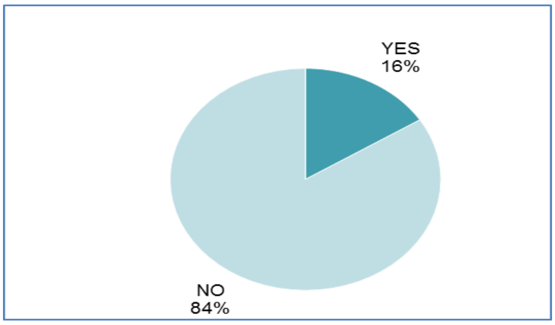
We observed that, 64% of the sampled tourists have knowledge on pirated music out of which 40% identify pirated music by the packaging, 24% by the quality of songs, 16% by the price of the CDS/cassettes and 8% the selling outlet. 84% of the tourists interviewed do not acquire pirated music but the remaining 16% do acquire pirated music.

Figure 14.3.5 Knowledge of pirated music among Tourists



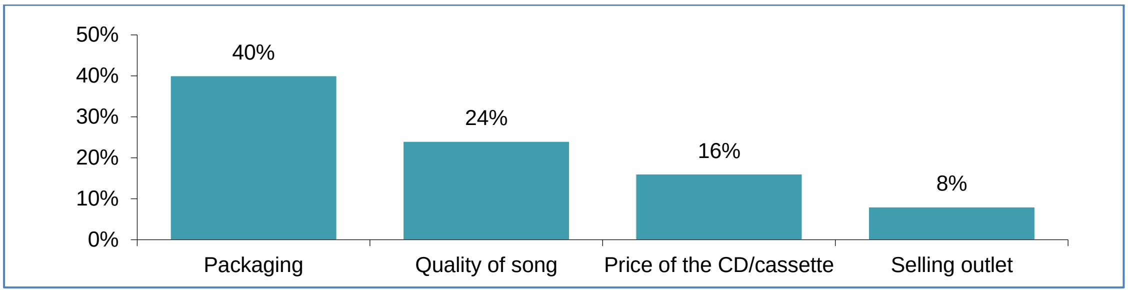
Source: KPMG Analysis

Figure 14.3.6 Proportion of Tourists who acquire pirated music



Source: KPMG Analysis

Figure 14.3.7 Ways pirated music is identified among Tourists



Source: KPMG Analysis

Various studies have alluded to the seriousness of piracy with some estimating that over 70% of music products are pirated with the original constituting just 30% (Pedersen, 2008). Piracy was one of the serious challenges that were mentioned by both musicians and producers. While 77.5% of musicians agreed that the problem is very serious, 84.7% of producers rated it as very serious.

Payola ('Pay or you lose airplay')

Payola is a term used within the media circles to stand for 'pay or you lose airplay'. This is a phenomenon where musicians and music producers have to pay radio stations for their songs to be played on air. This has arisen from the fact that authors want to have avenues to market their products. However, radio stations use songs as part of their content hence are required to pay musicians in the form of royalties. The problem seems to have been scaled up to the extent that it has become a norm for the producer to incur this cost.

The survey revealed that 73% of musicians believe that payola is a very serious weakness and a similar 72.9% of producers agreeing that it is very serious. The lack of awareness of the responsibility of the stations to pay royalties may also account for the existence of this phenomenon.

Lack of a Regulatory Body

The music sector does not currently have a defined body to provide both policy and strategic directions. The sector has relied on allied institutions such as the National Commission on Culture, Arts Centres, and the Copyright Office to function. No centralised body has been set up to define the activities of the sector, identify strategy to develop and promote it. Until recently, the creative arts and for that matter music sector did not have a ministry hence they had to be working through the erstwhile Ministry of Culture and Traditional Affairs. The lack of a vision and strategic direction accounts for the disunity and uncertainties within the sector. The creation of the Ministry and the GSGDA 2010 – 2013 are expected to bring some direction to the sector.

Lack of Unity in the Sector

Resulting from the lack of a regulatory structure is the disunity among the various professionals in the sector. There is a multiplicity of professional organizations with similar interests. Among the performers alone there are over six associations seeking to bring songwriters, performers and composers together. These associations also appear to rival the Musicians Union of Ghana (MUSIGA), which is a member of the Trades Union. This rivalry has resulted in a divided front for the sector with each group looking to gain recognition. The quest to gain recognition has led to lots of stakeholders stepping on each other's toes, resulting in personality clashes. The producers, publishers and record labels have three different associations, which all have representation on the GHAMRO Board.

In the survey, musicians and producers were asked to rate the seriousness of the lack of unity. Out of the 445 interviewed 53% recognized that the lack of unity is a very serious problem. Over 55% of producers recognized the lack of unity as a very serious problem.

Limited Access to Finance

The study has revealed that access to finance is a major issue confronting the sector. The survey sought to identify the sources of finance for the professionals along the value chain. The following sources were considered – personal, loan from bank, loan from friend, sponsorship and other sources. The results showed that personal sources of funds for musicians constitutes close to 90% of all the sources. Additionally, 60.9% indicated that they obtain 100% of their finance from personal sources.

The results for the producers are not different from the musicians. Personal sources of funds constituted 83.4% of the total funds for producers. Close to 60% indicated that they finance their business solely from personal finance.

The study sought also to find out the level of seriousness of the issue of finance. While 78.2% of musicians agreed that the lack of finance is very serious, 69.5% of producers agreed that the issue is very serious. Loan from financial institutions constituted an insignificant source of income due mainly to the high interest rate and the unwillingness of the institutions to lend to the music sector professionals.

Limited Access to Equipment and Instruments

One major weakness is the limited access to instruments and equipment. Import duty was one of the major reasons why access to instruments has become a major constraint to the development of the sector. Even though currently there is no duty on the importation of music instruments prices are quite high and young professionals are unable to purchase them. The churches and other religious bodies provided most professionals access to instruments. This may be the reason why a lot of musicians could be creating the gospel genre.

In response to the questions as to whether they own their own musical instruments, 61.4% of musicians said they do not own their own instruments. Out of this proportion, 21.3% hired them while 17.8% used instruments provided by venue operators such as churches and clubs. The rest had access through other means such as being members of a band.

The survey also sought the opinion of musicians and producers as to the seriousness of this challenge. While 45.5% of musicians thought the challenge was very serious, 31.9% agreed that it was serious. 37.3% of producers also rated the challenge as very serious with 33.9% rating it as serious.

Lack of Technology

Technological advancement in music production appears not to have been embraced in the sector. With the sale of CDs and cassettes falling, the social media has become one of the sale and marketing channels for songs. The underdevelopment of the technology for the sale of music has limited the marketing options available for musician.

On the level of seriousness of this challenge, 33.9% of musicians responded that lack of technology is a very serious issue while 25.8% said it is serious. A larger proportion of producers (44.1%) however, agreed that the issue is very serious.

Lack of Enforcement of Copyright Laws

The sector has a number of enactments to protect the rights of musicians and producers. The Copyright Act 2005 (Act 690) and its amendments and the Copyright Regulations 2010 (LI 1962) provide the legal and institutional framework for enforcement of copyright. Though an Office has been created for registering musical works, the key challenge has been the ability to ensure that the rights of authors are protected. Piracy has been a menace in the sector depriving authors of their income. Though an anti-piracy team has been formed it has not been effective in tackling the problem.

The reasons for the lack of effectiveness include the limited resources available for monitoring products on the market. The task force requires logistics such as vehicles to oversee musical works and confiscate pirated copies.

Absence of Music in School Curriculum

Music education hitherto was a standalone subject offered at the basic and secondary schools. Until 2004 when the Creative Arts syllabus was developed music was prominent in the previous syllabus of 1998 and combined with dance. Presently, creative arts subject at the basic schools encompasses music which has not been properly developed for teachers to teach. The problem is compounded by the fact that students entering the tertiary level especially the universities have to study music without the foundations in music theory and practice. Assimilating the subject at tertiary level becomes a daunting task for students hence the interest is low.

Private music institutions are also limited in the country with a few individuals running such ventures on a limited scale. The implication is that professionals rely heavily on their talents to and not on value addition from music education. Musicians interviewed attested to this challenge with 33.9% responding this is a very serious problem and 29.7% also insisting that it is serious. Majority of producers also agreed that this is a very serious weakness affecting the development of talents in the sector.

Lack of technical manpower

A major challenge within the event organisation section of the music industry is with the unavailability of the required technical manpower necessary for organising events. As exists in Ghana at the moment, the means by which one can receive such technical training is through apprenticeship, on the job training with someone who has been trained outside the country or travelling outside the country for such training. Training institutions that caters for the creative arts industry includes the University of Ghana and National Film and Television Institute (NAFTI) (a typical film and television training institute). With regards to technicalities of event organisation such as set designing, stage lighting, event management, event conceptualisation and promotion among others, there are no courses or training programmes that train such technical resources.

Lack of venues purposely designed to hold music events

The major venues for music event organisation in Ghana are the National Theatre, the International Conference Centre and the Dome all located in Accra with average maximum seating capacities of about 1500, 1800 (900 seats naturally but can take extra 900) and 4000 respectively. The national theatre is technically an auditorium meant for the production of theatre art and not music events. Both the international conference center and the Dome are typically meant for conferences. However due to the complete unavailability of venues for hosting large audience musical events, event organisers resort to these three venues.

Some of the implications with this challenge are that event organisers and artistes are unable to introduce variety in terms of performances and delivery. The output is thus almost always the same. The risk of monotony in performances, delivery and output of event organisers and musicians is really amplified through this challenge.

The main avenue of generating revenue from organising events aside sponsorships is through ticket sales. Sale of merchandise forms a rather smaller percentage of generating revenue. Again, costs of organising large audience/public events are astronomical. In order to break even, organisers are forced to hike ticket prices. These in turn disallow many people from attending and hence it is only the privileged few that can afford such prices that are able to experience such events. These deny the most Ghanaians the luxury of Ghanaian brewed entertainment.

Due to the pressure being mounted on these venues, the Dome has been closed down because of safety concerns that have been raised repeatedly with using the venue to organise large audience events since it was not primarily designed for such purposes. That means even more pressure is going to be mounted on the two venues that remain.
If Accra, the most developed region of Ghana, is suffering this predicament, it very obvious, that all the other regions are suffering same.

Inadequate export promotion services

Most brilliantly brewed Ghanaian music only survive up till the shores and borders of the country and are unable to penetrate into the world market and as such denying the world the privileges of Ghanaian music. Ghana on the other hand is losing all the benefits of exporting Ghanaian music, including the advertisement of the country and the associated revenue it would generate. Much effort needs to be invested into the export of Ghanaian music by artistes, sound engineers, marketers/promoters and the Government.

14.4 Opportunities

Creation of the Council for Creative Industries

Similar to the councils found in other jurisdictions such as the Arts Council of England and the National Arts Council of South Africa, the GSGDA seeks to promote the establishment of a Council for the creative industries. The Council is expected to create a vision and provide a policy direction to the industries. All over the world, the councils are set up to ensure that creative business have access to funds. The idea of a council is expected to develop strategy for the industries and to create channels for creative businesses to access funds. This is expected to create a platform for the music sector to develop a strategy and to seek governmental support within the holistic framework of creative industries. The Council will also serve as a conduit for the government to engage the creative arts domains and to identify ways to address the challenges of the sector.

Development of National Intellectual Property Policy and Strategy (NIPPS)

The Ministry of Trade and Industries (MoTI) has developed a policy and strategy to manage the intellectual property regime and to encourage creativity and innovation. The NIPPS has been designed to ensure that the protection of creative work is brought to the forefront of the development of the industries. The system as it operated now has a number of institutions formed to implement the intellectual property of creators so the strategy provides the platform for the legal framework to be reviewed so as to bring the laws up to date to ensure that they meet international best practice.

NIPPS also provides for the establishment of an Intellectual Property Office where administration and management of intellectual property will be harmonized and well coordinated. The Office is expected to be strengthened with resources trained in intellectual property rights and logistics. The policy document is also planning to set up a centre for creative industries to ensure that creative businesses are linked with the centre to derive maximum benefits from their intellectual asset.

Establishment of the Ministry of Tourism, Culture and Creative Arts

The government in 2012 created the Ministry of Tourism, Culture and Creative Arts in recognition of the growth of the industries. Even though a comprehensive plan is yet to be developed by the Ministry, it provides an opportunity for the music domain to identify needs and to package it in the form of a strategic plan for the ministry to include in its annual planning. The absence of the specific ministry meant the music sector had to work through allied bodies to seek government assistance.

Government Financial Support

The creative sector has recently been recipients of government financial support with the allocation of funds to it. This support is intended to help identify the potential of the industries so as to provide long term funding for development. However, the lack of a common vision for the industries appears to be the major challenge.

14.5 Threats

Advancement in Technology

Whilst this could be considered a strength, it could also constitute a threat to the survival of the music industry. Technology currently allows songs of musicians to be downloaded on the internet either free or paid for. The lack of technical logistics to prevent illegal uploading and downloading of songs will deny authors their economic right. Also pirates have access to devices that enable them duplicate CDs in a speedy manner to sell on the market.

Music from other Jurisdictions

Ghanaian music faces stiff competition from music produced in other countries such Nigeria. The market is saturated with both African and Western music such that the purchase of Ghanaian music appears to declining. The airwaves are filled with various music genres and this creates a competitive environment for local musicians to operate. Again, artistes from other countries have the opportunity to perform at major events to the neglect of local artistes and talents.

Brain drain of music professionals

The country suffered from a flight of music professionals during the period of military interventions. This became prominent in the late 70s and early 80s when a lot of musicians left the country to practice in countries such as Nigeria and United Kingdom. Some of the factors that accounted for the exit of musicians from Ghana include the better organized music industry outside the country, existence and enforcement of copyright laws and the access to markets outside.

14.6 Conclusion

The music sector has some identified strengths as well as weaknesses. The major strength is the availability of pool of talents along the entire value chain. Also a number of laws exist for the protection of the rights of authors with the setting up of the Copyright Office and the Ghana Music Rights Organization. However, the sector faces key challenges including piracy, lack of enforcement of copyright laws, disunity, and limited access to music instruments. Ultimately, these weaknesses lead to frustration among the actors of the value chain and overall low profitability within the industry.

Opportunities exist for the resuscitation of the sector with the recognition of creative arts as part of the Ministry of Tourism and the proposed Council for Creative Arts Industries. The sector however, has to address threats such as the influx of music from other jurisdiction and the threat from digital devices for illegal uploading and downloading of songs.

15 Recommendations

15.1 Observations and Recommendations

This section presents an evaluation of the observations made and the relevant recommendations. Recommendations have been made based on the findings from the study, interactions with industry players and interviews with music patrons. Table 15.1.1 presents recommendations on the various observations.

Table 15.1.1 Observations and recommendations

1. Sector Recognition	
Observations	• The creative sector of which music is a sub-sector has not been given the needed recognition within the government's policy making and planning. The sector has been associated variously with several ministries and bodies until 2013 when it was attached to the Ministry of Tourism, now the Ministry of Tourism, Culture and Creative Arts. The music sector over the years was subsumed into the culture with limited emphasis on music. This limited recognition of the sector implies that it has been prioritised in government budgeting processes.
Recommendations	• A new ministerial portfolio should be created for the creative arts to ensure that it is given the priority in policy making and planning • The Ghana Statistical Service should incorporate the assessment of the economic contribution of the music industry as part of its economic evaluation to provide the economic recognition

2. Sector Organization	
Observations	• Currently, the sector does not appear to have a common vision towards which all actors are focused on. There is a multiplicity of associations within the sector which inhibits cohesion and unity. The lack of a central coordination point for the development of strategies, action plans and funding needs means the sector remains unguided, underfunded and stifled of the needed stimulus to propel growth.
Recommendations	• Facilitate the creation of the Arts Council or the Council for the Creative Industries to coordinate activities of the sector. The Council should develop a vision, mission and the strategic objectives for the entire sector. This must aim at harmonizing the activities of the domains within the sector. • Create a Music Development body with the mandate to identify and propose the areas that require attention of the government and private sector. • Develop a medium-term strategic plan for the sector based on the vision to be developed by the Council.

3. Educational & Capacity Building

3. Educational & Capacity Building	
Observations	• A key finding from the survey was the limited music education for most professionals. Less than a quarter of musicians have some form of education of training in music with one in ten having tertiary education in music. • Interviews with experts in education sector revealed that music as a discipline has not been given the needed recognition in the primary and secondary education. This situation has negatively affected the development of talents at the basic school level and the few who venture music at the tertiary have limited foundation in music. Music appreciation at the tertiary level then becomes difficult as students do not know the basics of music. It has been argued that the lack of teachers account for the low emphasis on music. However, our study revealed that three public institutions produce over 100 graduates in music annually. • Industry players also mentioned the limited number of schools providing music training and education. A few private institution provide some form of music training but they are either expensive or have limited infrastructure. • A number of foreign embassies have organisations that provide capacity building for music professionals. However, the challenge has been that MUSIGA and the other associations are yet to partner these organisations
Recommendations	• The Ministry of Education should elevate music and make it attractive for students at the basic and secondary level. Music should be made part of the curriculum of basic and secondary schools to develop talents. • Government should support MUSIGA in setting up the music department at NAFTI which is focused on developing talents along the music value chain. • The Ministry of Education should collaborate with private music training schools and draw on their expertise. This could be done by way allowing students to practice in these schools or leveraging on the skilled instructors to provide periodic practical lessons at these schools.

4. Infrastructure	
Observations	• With the decline in record sales, a critical source of income for musicians has been live performances. However, the lack of venues designed for music shows means that event organisers have to settle for existing venues not designed for music shows. These venues lack adequate facilities including inbuilt lighting systems, stage set and sound systems and are limited in capacity. • Related to the above is the limited infrastructure for musicians to sell songs online. The internet payment platform has not been developed to allow music fans to purchase songs online.
Recommendations	• The Government should initiate projects in the various regions to develop music venues in order to boost organisation of events. These would help in cutting down costs for organising events since there would adequate supply of venues. They would also indirectly enable reduction in the prices of tickets which is very likely to result in massive patronage of events since it would be affordable. This would revive the

	interest of Ghanaians in music events. • Investments into the music industry have high pay back periods and as such discourage investors. The Government could also embark on public private partnerships aimed at building infrastructure (venues inclusive) in the music industry. • The enabling environment should be created to allow private entities to set up the internet payment platform.

5. Regulatory & Policy Framework	
Observation	• The Copyright Act makes provision for the setting up of an anti-piracy team to monitor piracy. However, it was observed that this team has not been functional due to the lack of collaboration between the Copyright Office and GHAMRO. • The Copyright Regulations does not expressly define users of music so as to give GHAMRO the scope of royalty collection. • The Electronic Communications Act does not provide for radio stations to have logging machines for music played. • The Cultural Policy document does not make provision for the development of infrastructure facilities for the music industry.
Recommendations	• Anti-piracy monitoring team should be empowered to conduct regular inspection. • The Copyright Regulations should be amended to expressly define the categories of users of music. This will provide the legal backing for GHAMRO to put in place revenue mobilization strategy. • The National Communications Authority should work together with music sector stakeholders to ensure that radio stations log music played and pay appropriate royalties.

6. Collective Management Organisation	
Observation	• GHAMRO is the licensed music rights collection body in Ghana. Though the research team was not granted a formal audience from GHAMRO Board, informal discussions with members showed that mobilization of royalties needs to be improved. Users of music required to pay royalties are not properly defined and targeted to make the necessary payments. • It was also observed that GHAMRO has categorised members based on the number of albums released. This was used to estimate the amount of royalties one is entitled to receive. However, this system ignores the fact there may some musicians whose songs are not played frequently but receive money due to the number of albums released. • The governance structure has a board which also is responsible for the day-to-day management activities of the organisation. Just as operates in other jurisdictions like the Performing Rights Society (PRS) in the UK and the South Africa Music Rights Organisation (SAMRO), the board of directors is separate from the management. The management team has the day-to-day administration of the society while the board performs a supervisory role. This ensures independence, proper administration and accountability.

Recommendations	• Appropriate legislation must be put in place to back the collection of royalties from the various users of music. The legislation needs to comprehensively define the users of music and followed with • The management structure of GHAMRO also needs enhancement to ensure effective running of the organisation. The organisation should consider having a permanent management team that will be given specific targets to meet in terms of coverage and revenue mobilization. • The criteria for sharing royalties require some amendment to ensure that musicians whose songs are played get their royalties. The current system of categorizing musicians involves those with a larger number of albums getting more money than those with lesser number. This however does not account for new musicians whose songs are played widely on release. • The possibility of establishing private CMOs must be considered.

7. Marketing & Packaging	
Observation	• Consumers of music in and outside Ghana remarked that the packaging of Ghanaian CDs is not attractive. This may also be as a result of the numerous pirated CDs that are in the system. • In addition to the unattractive packaging is the issue of limited recognized retailing shops for music. The central business district houses the bulk of the wholesalers and retailers of music but very few products can be found in shopping centres and malls. • Ghanaian music sector is also faced with lack of patronage outside the country. Interviews with tourists indicated that during festivals outside the country, very little is known music from Ghana but other African countries are significantly represented.
Recommendations	• Musicians should add value to their products by using marketing and sales companies experienced in packaging products. This should be complemented by strengthening the anti-piracy team to ensure that fake CDs are not sold on the market. • The Ministry of Foreign Affairs (MFA) should create a culture desk in Ghanaian missions abroad with particular emphasis on music from Ghana. Most countries are identified with the kind of music played and Ghana should leverage on the international goodwill to market the music originating from the country. • MFA should collaborate with MTCCA to identify international festivals where Ghanaian music can be showcased and promoted.

8. Financing	
Observation	• Professionals in the sector face the challenge of access to finance which is essential in music production. Interviewees along the value chain use mainly personal funds for music production. • The sector faces limited funding from financial institutions partly due to the perception that the sector is not profitable and not professionally managed.

Recommendations	• A fund should be created for the development of the creative arts as is the case with other jurisdictions. The fund should be resources through annual budgetary allocation and supplemented by donor funding. The Arts Council to be created should be body to administer the fund and to develop criteria for disbursing funds to the various domains. • Professionals should be trained on music business and how to develop a proposal for funding

9. Taxation	
Observation	• The sector is also subject to the value added tax where the percentage is slapped on the ticket value. Sometimes event organisers have had to prepay this to the Ghana Revenue Authority or it is paid immediately after the event. • No special incentive is available for the music industry in terms of tax relief for sponsors of the sector or tax holiday for entities operating in the sector.
Recommendations	• Value added tax on ticket sales should be removed in order to make the price of tickets relatively affordable. • Sponsors of music events and shows should be granted some tax incentives to enable the sector attract the needed funding.

10.Performance Fees	
Observation	• It was also observed that performance fees charged by musicians varied significantly. No categorization exists to guide entities employing the services of musicians to determine the fee due the artiste. This has resulted in some artiste charging high appearance fees for shows.
Recommendations	• MUSIGA should develop criteria for categorising musicians and allocate a range of fees. This should be circulated to event organisers.

16 Conclusion

16.1 Objectives

The objective of this assignment was to conduct the following:

- Provide a baseline data on the music industry using both primary and secondary data
- Understand and explain the structure and functioning of Ghana's music industry with a view to identifying its areas of strength and weakness
- Make recommendations and proposals to stakeholders and government on the way forward with the industry
- Stimulate discussion both within the music industry and between the music industry, government and other interested organisations as to what projects and processes would be most useful in building the Ghanaian music industry.

16.2 Methodology

The methodology for the study relied primarily on primary data and was complemented by secondary sources. The data for this study were gathered mainly through the following sources; review of relevant documentations, interviews and questionnaire administration.

To successfully administer questionnaires, the music industry was stratified into eighteen (18) different strata. In total we administered over 1,400 questionnaires countrywide with over 90% (1,260) response rate.

16.3 Findings

- ✓ The music domain remains the most active of the creative art
- ✓ The music sector value chain can be compared with a typical value chain, albeit, with some missing links such as a well resources publishing and record label of international repute
- ✓ The sector organisation shows fragmented front with various bodies and associations pursuing peculiar interest
- ✓ Industry oversight has not been effective with the sector having to work with various ministries over the past decades until the creation of the Ministry of Tourism, Culture and Creative Arts. This has impacted the formulation and implementation of policies aimed at improving the functioning of the sector
- ✓ The regulatory framework for the sector does not provide enough protection against challenges such as piracy. Again no specific policy or plan has been developed for the sector
- ✓ Industry infrastructure requires major investment especially in venues and training centres. A major strength is the existence of educational and capacity building institutions which are capable of training professionals in the industry
- ✓ The sector is estimated to employ over 27,000 along the value chain and it contributes approximately 0.20% to the GDP of the country
- ✓ Major strengths include the availability of a market for music, a pool of talents and the existence laws to protect the intellectual property of professionals
- ✓ However, the sector faces critical challenges such as piracy, lack of recognition, 'payola', lack of funding, disunity and lack of access to international market
- ✓ Aside these weaknesses, the sector faces a threat from the influx of foreign music which are competing with the local music

- ✓ Opportunities exists for the sector to grow, which includes the introduction of a council to oversee the creative industries, the development of the intellectual property rights office and the recognition of the sector in the government's planning programme

16.4 Observations and Recommendations

The study has sought to understand the functioning of the music sector in Ghana and to identify challenges that need to be addressed. Among the recommendations are the following;

- ✓ The creation of a new ministry responsible for the creative arts
- ✓ The creation of the Arts Council
- ✓ Preparation of a medium term strategic plan for the sector
- ✓ Music to be reintroduced as a discipline on educational institutions
- ✓ Statistical Service to compute the annual addition to GDP by the sector
- ✓ Government to invest and also create the environment for private sector to invest in infrastructure
- ✓ The NCA to work together with the CMO to ensure that radio stations log the music that they play on air
- ✓ The CMO to be strengthened and well-resourced to undertake the collection of royalties
- ✓ Government to waive VAT on entertainment and also offer tax incentives for corporate bodies supporting music development

The research has also provided a baseline data for further studies to be conducted to assess the growth pattern. Even though the sector has traversed many phases, it holds the potential to grow to become a major contributing sector to the socio-economic development of Ghana. In this light, policy makers, industry players, researchers and all stakeholders need to collaborate to ensure that gains are sustained and challenges are contained.

17 Appendices

17.1 Appendix A – Details of Educational Institutions

Greater Accra Region

Names of Institutions	Region/Location	Description	Selected Taught Courses
Academy Of African Music & Arts	Kokrobite, Greater Accra Region	Private	Traditional Music and Dance
Adipa Music Educational Ltd	Tema	Private	Keyboard and Music
Play Piano Consult International	Kotobabi	Private	Keyboard
The School of Performing Arts- University of Ghana	Legon	Public	B.A. Music (Fundamentals of Music Theory, Contemporary Music in Ghana, Traditional Music of Ghana, Survey of History of Western Music, Introduction to Harmony and Counterpoint, Diatonic Harmony, Chromatic Harmony, The Orchestra and Orchestral Techniques, Music of West and Central Africa, Counterpoint, Ghanaian Popular Music, African Pop Music, Music of Southern Africa, Music of the Baroque and Classical Periods, Introduction to Music Studio, Romantic and Twentieth Century Music, Process of Art, Musical Cultures of the World, Twentieth Century Composition, Music of North Africa, Musical Traditions of the African Diaspora, Extended Composition, Music of East Africa, Orchestration, Fugue, Conducting, Theories in Western Music, Seminar in Composition, Form and Analysis in African Music, African-American Music in North America, Music Studio, African Drum, Repertoire and Directing)
Methodist University College	Dansoman	Private	B.A. Music Studies (Theory and Composition: Elementary, Applied Music : Elementary, Basic Sight Reading and Aural Skills, Structure and, Music Appreciation, Perspectives in Church Music, Introduction to Notation Software, Applied Music: Introductory Choral and Ensemble, Applied Music: Intermediate, History and Literature of Western Art Music Styles: Renaissance-Classical, Advanced Music Notation Software, Specific Writing Skills,

Methodist University College (continued)			Intermediate Choral Ensemble, Applied Music: Intermediate, History and Literature of Western Art Music Styles: Romantic-20th Century, Studies in Contemporary Popular Music Composition, Music in Christian Liturgy, Introduction to Audio Recording Technique, Music Education for Elementary Schools in Ghana, Choral Rehearsal: African and Western Repertoire, Advanced Applied Music, History and Literature of African Art Music, Form and Structure in African Music, Choral Repertoire and Conducting, Introduction to Musicology, Advanced Studies in Contemporary Popular Music Composition, Introduction to Music Criticism and Aesthetics, Introduction to Sound Engineering, Music Education for Second Cycle Schools in Ghana, Advanced Theory and Composition, Choral Rehearsal: Major Pieces, Applied Music and Musicianship, Acoustics and Physics of Musical instruments, Hymnology, African Studies, Instrumental Repertoire and Conducting, Introduction to Video Recording Technique, Fieldwork in Musicology, Research Methods, Final Theory and Composition, Applied Music and Performance, Music in Christian Education, Choral and Ensemble Work: Popular Diasporan, Business and Professional Ethics, Music in World Cultures, Extensive Study of Ghanaian Traditional Music, Aesthetic Evaluation of Selected Art Works, Choral Directing and Church Choir Administration, Applied Music and Musicianship: Public Performance, Choral and Ensemble Work, African Music in the Diaspora, Seminar in Church Music, Contemporary Usages of Traditional African Music and Supervised Practicum)
Globe Trotters Music School	Abelenkpe	Private	organ lesson, guitar, the lead, rhythm, and bass guitar, voice training, xylophone, flutes
Action Secondary Technical School	Madina	Private	Music
Achimota School	Achimota	Public	Music
Great Lamptey-Mills Complex School	Abossey Okai	Private	Band Music
Alpha Beta Education Centre	Dansoman	Private	Music
College of Art & Industry	Tema	Private	Music and dance
First Star Academy	Tema	Private	Music

Golden Age International School	Abelemkpe	Private	Music
Lincoln Community School	Abelemkpe	Private	Music
Dwensie Music Institute	Adabraka	Private	Music

Eastern Region

Ghana Academy of Music and Art	America and Ghana	Private	Music and Art education for the physically challenged

Central Region

Names of Institutions	**Location**	**Public/Private**	**Selected Taught Courses**
University of Education	Winneba	Public	**Underdraduate Courses** Rudiments and Theory of Music, Musical Styles I-Introduction to Ethnomusicology, Musicianship & Ensemble I, Introduction to Music Technology, Theatre Studio, Philosophy of Education, the School Curriculum, Social Change and National Development, Elementary Harmony, Musical Styles II-Introduction to Western Music Literature, Communication and Study Skills, Educational Technology, African Studies, Curriculum Dev. And School Music in Ghana, Psychology of Music, Principles and Practice Of Teacher Education, Music Appreciation, Choral Directing, Military Band Directing, Dance Band Directing, African Music and Dance Directing, Brass Band Directing, Dance Drama Directing, Psychology of Human Development and Learning, Trends in Education and School Management in Ghana, Orchestration, Teaching the Musical Arts in Ghanaian Schools, Methods of Teaching Music, Introduction to Musicology, Applied Music, Measurement, Evaluation and Statistics in Education, African Music and Dance, Music Aesthetics and Criticism, Musics of the World's Cultures **Graduate Courses** Arts and Identity, Women in Ghanaian Arts and Culture, Arts, Child and Family,

			Managing National Cultural Policy Change, Performances and Culture, Arts in African Society, Indigenous People and Visual Culture, Voices of Women in the Arts, Cultural Policy and Practice , Art and Design, Curriculum Design, Management and Evaluation of Art Institutes and Centres, Digital Imaging, Organization and Administration of the Arts, Costume Design, Lighting Design, Speech for the Theatre, Movement for Actors/Actresses, Textile Design and Innovation, Aesthetics and Criticism, Issues across the Arts, Interior Design History, History of the Arts in Ghana, Training the Professional Arts Practitioner, Philosophy of Arts, Arts and Psychology, Copyrighting, Digital Video/Audio Editing, Artistic Presentation and Entrepreneurship, and Arts in Early Childhood
Adisadel College	Cape Coast	Public	Music
Christ Legacy International School	Kasoa	Private	Music

Western Region

Names of Institutions	**Location**	**Public/Private**	**Selected Taught Courses**
Studio 52Performing Arts Academy	Sekondi-Takoradi	Private	Music, Dance and Acting

Brong Ahafo

Names of Institutions	**Location**	**Public/Private**	**Selected Taught Courses**
Panest Music School	Sunyani	Private	Music

Northern Region

Names of Institutions	Location	Public/Private	Selected Taught Courses
Bizung School of Music and Dance	Tamale	Private	Music and dance classes that are rooted in the traditional style of Northern Ghana
Volta Region			
Steve Friedson's Brekete Cultural Centre	Kedzi	Private	
The late Godwin Agbele's Dagbe Cultural Centre at Kopeyia		Private	
Eddie Ansah Fine Music organization	Ho-Tsito	Private	
The Institute of Music Development	Ho	Private	

17.2 Appendix B – Questionnaires administered for the survey

A Study of the Music Sector in Ghana
Questionnaire for Traditional Folkloric Groups

Serial No:

Interviewee's Address (Optional)	
Region of Residence	
Street name	
Name of Group/Band	
Telephone number	

Group Data

CG1- How long has the group been in existence?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 20 years
☐05	Over

CG2 - Please indicate the region in which the group is located?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

CG3 - What is the group's total membership?	
Number	

CG3a - Indicate the gender composition of the group	
☐01	All male
☐02	All female
☐03	Mixed

CG3a – If gender composition is mixed, what is the percentage composition of females in the group?	
☐01	Less than 10%
☐02	Less than 20%
☐03	Less than 30%
☐04	Less than 40%
☐05	Less than 50%
☐06	Over 50%

CG4 - Do you belong to any of the following bodies?	
☐01	Musicians Union of Ghana (MUSIGA)
☐02	Association of Music Rights Owners (AMRO)
☐03	Ghana Music Rights Organization (GHAMRO)

☐04	Ghana Association of Phonographic Industries (GAPI)
☐05	Composers and Authors of Music Association (CAMA)
☐06	Ghanaian Association of Composers, Authors and Publishers (GHASCAP)
☐07	Songwriters and Performers Association of Ghana (SPAG)
☐08	Veterans Musicians Association of Ghana (VEMA)
☐09	Professional Musicians Association of Ghana (PROMAG)
☐10	Record Producer and Publishers Association of Ghana (REPPAG)
☐11	National Association of Ghanaian Music Producers (NASGAMP)
☐12	Other (please specify)

CG5 - Please indicate what proportion of your activities are commercial (that earn income) and the proportion that is not commercial (for leisure)?	
Commercial	
Non-commercial	

CG6 - In which of the following activities do you partake within the year?	
☐01	Studio recording
☐02	National events (NAFAG, PANAFEST, Independence day celebrations, etc)
☐03	Competitions
☐04	TV appearance
☐05	Beach performances
☐06	Funerals
☐07	Other (Please specify)

CG6 - Please indicate how many of the following activities you partake in within a year?	
Activities	**Number**
Studio recording	
National events (NAFAG, PANAFEST, Independence day celebrations, etc)	
Competitions	
TV appearance	
Beach performances	
Funerals	
Other (Please specify)	

CG7 - Please indicate how much you charge for the following activities you partake in within a year?	
Studio recording	
National events (NAFAG, PANAFEST, Independence day celebrations, etc)	
Competitions	
TV appearance	
Beach performances	
Funerals	
Other (Please specify)	

CG8 - Do you compose your own songs?	
☐01	Yes
☐02	No

CG9 - How many songs have you composed since the group's inception?	
Number	

CG11 - Out of the composed songs, how many have you recorded?	
Number	

CG12 - How many albums do you have to your credit?	
Number	

ED1 - How much does each of the following items cost in recording a single track?	
Cost Item	**Amount**
Studio engineer	
Instruments	
Video clip	
Miscellaneous (transportation, telephone calls, etc)	
Others (please specify)	

ED3 - How many albums do you sell in a year?			
	CD		**Cassette**
☐01	None	☐01	None
☐02	1 – 1000	☐02	1 – 1000
☐03	1001 – 2000	☐03	1001 – 2000
☐04	2001 – 3000	☐04	2001 – 3000
☐05	3001 – 4000	☐05	3001 – 4000
☐06	4001 – 5000	☐06	4001 – 5000
☐07	Above 5000	☐07	Above 5000

EC8 - What is the average selling price of an album?	
CD	
Cassette	

CG18 - Who produces your music?	
☐01	We produce our own music
☐02	Production company (please specify)

CG21 - Do you own your own instruments?	
☐01	Yes
☐02	No

CG21 - If no to above, how do you obtain instruments?	
☐01	We share with other groups
☐02	We hire them
☐03	Supplied by venue operators (including churches)
☐04	Others (please specify)

CG22 - How much do you earn in a year from the following?	
Advertisements	
Sponsorships	
Merchandising	
Royalties	

CG24 - How do you finance your activities and can you indicate the percentage in the following category?		
	Category	**Percentage**
☐01	Self-financing	
☐02	Loan from bank	
☐03	Loan from friend	

☐04	Sponsorship	
☐05	Other	

General information

CG25 - What are the major strengths of the industry?

CG26 - What are the key challenges?

CG27 - What recommendations do you have for the industry?

A Study of the Music Sector in Ghana
Questionnaire for Public Bands

Serial No:

Interviewee's Address (Optional)	
Region of Residence	
Street name	
Name of Band/Band	
Telephone number	

Band Data

PB1- Please tick as it applies to you?	
☐01	Ghana Police Service
☐02	Army
☐03	Navy
☐04	Air Force
☐05	Prison Service
☐06	Ghana Immigration Service
☐07	Customs, Excise and Preventive Service
☐08	Other (please specify)

PB2 - Please indicate the region in which the band is located?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

PB3 - What is the band’s total membership?	
Number	

PB3a - Indicate the gender composition of the band	
☐01	All male
☐02	All female
☐03	Mixed

CG3a – If gender composition is mixed, what is the percentage composition of females in the band?	
☐01	Less than 10%
☐02	Less than 20%
☐03	Less than 30%
☐04	Less than 40%
☐05	Less than 50%
☐06	Over 50%

PB4- How long has the band been in existence?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 20 years
☐05	Over 20 years

PB6 - Please indicate what proportion of your music activities are in the commercial (that earn income) and the proportion which is not commercial (for leisure)?	
Commercial	
Non-commercial	

PB8 - Which of the genres do you play during live shows?	
☐01	Hip-life
☐02	Classic highlife (Old time)
☐03	Contemporary highlife (Modern)
☐04	Choral
☐05	Art music
☐06	Gospel
☐07	Traditional/folkloric
☐08	Reggae
☐09	Jazz
☐10	Film/Video music
☐11	Afro Beat/Afro Rock/Afro Jazz
☐12	Brass Band (Western type regimental marching music)
☐13	Brass Band (Local marching music – “Adaha”, “Konkoma”)
☐14	Other (Please specify)

PB9- In which of the following activities do you partake within the year?	
☐01	Studio recording
☐02	National events (PANAFEST, NAFAG, Independence day celebration)
☐03	International activities
☐04	Competitions
☐05	TV appearances
☐06	Outdoor activities (Beaches, carnivals, street parades)

☐07	Funerals
☐08	Traditional durbars, out-dooring & marriages
☐09	Other (Please specify)

PB10- Please indicate how many of the following activities you perform in a year?	
Studio recording	
National events (PANAFEST, NAFAG, Independence day celebration)	
International activities	
Competitions	
TV appearances	
Outdoor activities (Beaches, carnivals, street parades)	
Funerals	
Traditional durbars, out-dooring & marriages	
Other (Please specify)	

PB11- Please indicate how much you charge for the following activities you perform in a year?	
Studio recording	
National events (PANAFEST, NAFAG, Independence day celebration)	
International activities	
Competitions	
TV appearances	
Outdoor activities (Beaches, carnivals, street parades)	
Funerals	
Traditional durbars, out-dooring & marriages	
Other (Please specify)	

PB12 - Does the band compose its own songs?	
☐01	Yes
☐02	No

PB7 - If Yes to above, which of the following genres do you compose?	
☐01	Hip-life
☐02	Classic highlife (Old time)
☐03	Contemporary highlife (Modern)
☐04	Choral
☐05	Art music
☐06	Gospel
☐07	Traditional/folkloric
☐08	Reggae
☐09	Jazz
☐10	Film/Video music
☐11	Afro Beat/Afro Rock/Afro Jazz
☐12	Brass Band (Western type regimental marching music)
☐13	Brass Band (Local marching music – “Adaha”, “Konkoma”)
☐14	Other (Please specify)

PB13 - How many songs have you composed since the band’s inception?	
Number	

CG11 - Out of the composed songs, how many have you recorded?	
Number	

CG12 - How many albums do you have to your credit?	
Number	

ED1 - How much does each of the following items cost in recording a single track?	
Cost Item	**Amount**
Studio engineer	
Instruments	
Video clip	
Miscellaneous (transportation, telephone calls, etc)	
Others (please specify)	

ED3 - How many albums do you sell in a year?			
	CD		**Cassette**
☐01	None	☐01	None
☐02	1 – 1000	☐02	1 – 1000
☐03	1001 – 2000	☐03	1001 – 2000
☐04	2001 – 3000	☐04	2001 – 3000
☐05	3001 – 4000	☐05	3001 – 4000
☐06	4001 – 5000	☐06	4001 – 5000
☐07	Above 5000	☐07	Above 5000

EC8 - What is the average selling price of an album?	
CD	
Cassette	

CG18 - Who produces your music?	
☐01	We produce our own music
☐02	Production company (please specify)

CG21 - Do you own your own instruments?	
☐01	Yes
☐02	No

CG21 - If no to above, how do you obtain instruments?	
☐01	We share with other bands
☐02	We hire them
☐03	Supplied by venue operators (including churches)
☐04	Others (please specify)

CG22 - How much do you earn in a year from the following?	
Advertisements	
Sponsorships	
Merchandising	
Royalties	

General information

PB27 - What are the major strengths of the industry?

PB28 - What are the key challenges?

PB29 - What recommendations do you have for the industry?

A Study of the Music Sector in Ghana
Questionnaire for Creators (Musicians)

Serial No:

Interviewee's Address (Optional)	
Region of Residence	
Street name	
Name of interviewee	
Telephone number	

Personal Data

PD1- Are you . . . ?	
☐01	Less than 25 years
☐02	25 to 29 years old
☐03	30 to 34 years old
☐04	35 to 45 years old
☐05	Above 45

PD2 - Level of education	
☐01	Primary
☐02	Secondary
☐03	Tertiary
☐04	None
☐05	Other (please specify)

PD3 - Do you have music education at primary or secondary level?	
☐01	Yes
☐02	No

PD4 - Marital status?	
☐01	Married
☐02	Single
☐03	Divorced
☐04	Widowed
☐05	Other (please specify)

PD5 - Gender

☐01	Male
☐02	Female

PD6 - Number of dependents do you have?	
☐01	1
☐02	2
☐03	3
☐04	4
☐05	5
☐06	Over 5
☐07	None

Professional Characteristics

PC1 - How will you describe yourself? **(Multiple aided question)**	
☐01	Lyricist
☐02	Composer
☐03	Arranger
☐04	Performer/singer
☐05	Instrumentalist
☐06	Dancer/choreographer
☐07	Club DJ
☐08	Other (Please specify)

PC2 - How long have you been in this profession?	
☐01	Less than 1 year
☐02	1 - 5 years
☐03	5 – 15 years
☐04	15 – 20 years
☐05	Over 20 years

PC3 - What is your status in this profession?	
☐01	Full-time
☐02	Part-time

PC4 - Where are you based?	
☐01	Ghana
☐02	Abroad

PC5 - If based in Ghana, which region do you operate from?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐03	Brong Ahafo
☐04	Northern
☐05	Upper East
☐06	Upper West

PC6 - If based abroad could you indicate the reason why? (**multiple aided question**)	
☐01	Better organized music industry outside
☐02	Copyright laws respected

☐03	Financial
☐04	Access to new technology
☐05	Access to larger market
☐06	Other (Please specify)

PC7 - Do you belong to any of the following bodies? **(Multiple aided question)**	
☐01	Musicians Union of Ghana (MUSIGA)
☐02	Association of Music Rights Owners (AMRO)
☐03	Ghana Music Rights Organization (GHAMRO)
☐04	Ghana Association of Phonographic Industries (GAPI)
☐05	Composers and Authors of Music Association (CAMA)
☐06	Ghanaian Association of Composers, Authors and Publishers (GHASCAP)
☐07	Songwriters and Performers Association of Ghana (SPAG)
☐08	Veterans Musicians Association of Ghana (VEMAG)
☐09	Professional Musicians Association of Ghana (PROMAG)
☐10	Record Producer and Publishers Association of Ghana (REPPAG)
☐11	National Association of Ghanaian Music Producers (NASGAMP)
☐12	Other (please specify)

PC8 - Do you belong to a band or troupe?	
☐01	Yes
☐02	No

PC8 - Do you teach music as part of your profession?	
☐01	Yes
☐02	No

PC9 - If Yes above, what area are you specialized in? **(Multiple aided question)**	
☐01	Playing of instruments
☐02	Music composition
☐03	Production
☐04	Stage performance
☐05	Marketing
☐06	Music theory and history
☐07	Other (please specify)

PC10 - Which of the genres do you create?	
☐01	Hip-life
☐02	Classic highlife (Old time)
☐02	Contemporary highlife (Modern)
☐03	Choral
☐04	Art music
☐05	Gospel
☐06	Traditional/folkloric
☐07	Reggae
☐08	Jazz
☐08	Film/Video music
☐09	Afro Beat/Afro Rock/Afro Jazz
☐09	Brass Band
☐08	Other (Please specify)

PC11 - In which language do you sing?	
☐01	English

☐02	French
☐03	Akan
☐04	Ewe
☐05	Ga
☐06	Frafra
☐07	Dagbane
☐08	Other (Please specify)

PC12 - Are you aware of the Copyright Act/Office to protect your property?	
☐01	Yes
☐02	No

PC13 - If Yes above, do you send your work to the Copyright Office for protection?	
☐01	Yes
☐02	No

PC8 - How many of your songs have you registered with the copyright office?	
☐01	None
☐02	1
☐03	2
☐04	3
☐05	4
☐06	5

PC15 - How many songs have you recorded?	
Number	

PC16 - How many albums do you have to your credit?	
Number	

PC17 - How many songs do you compose in a year?	
Number	

PC18 - How many songs do you record in a year?	
Number	

PC19 - Do you perform live shows or gigs?	
☐01	Yes
☐02	No

PC23 - If yes above, how many shows do perform in a year?	
Number	

PC24 - Do you collaborate with foreign artists to perform?	
☐01	Yes
☐02	No

PC20 - How many do you perform in a year?	
Location	**Number**
Ghana	
Abroad	

PC24 - If No to PC__, what are you reasons for not performing live shows?

☐01	Lack of opportunity
☐02	Low remuneration
☐03	No instruments
☐05	Others (please specify)

PC25 - Do you have a manager?	
☐01	Yes
☐02	No

PC26 - How long have you been with the manager?	
☐01	Less than 1 year
☐02	1 - 5 years
☐03	5 – 15 years
☐04	15 – 20 years
☐05	Over 20 years

PC27 - Do you produce your own music?	
☐01	Yes
☐02	No

PC28 - If No above, who produces your music?	
Name of entity	

PC29 - Are you a publisher yourself?	
☐01	Yes
☐02	No

PC30 - If No above, who publishes your music?	
Name of entity	

PC31 - Do you pay before your music is aired on radio or TV?	
☐01	Yes
☐02	No

PC35 - Do you own your own instruments?	
☐01	Yes
☐02	No

PC36 - If you do not own your own instruments, how do you obtain them?	
☐01	I share with friends
☐02	I hire them
☐03	Supplied by venue operators (including Churches)
☐04	Other (please specify)

PC37 - Have you won any local or international award in your career?	
☐01	Yes
☐02	No

PC38 - How many awards?	
☐01	1
☐02	2
☐03	3
☐04	4

☐05	5
☐06	More than 5

Economic Data

ED1 - How much does each of the following items cost in recording a single track?	
Cost Item	**Amount**
Studio engineer	
Backing vocalist	
Guitarist	
Video clip	
Artist charge	
Miscellaneous (transportation, telephone calls, etc)	

ED5 - How much does each of the following cost in duplicating CDs?	
Stamper	
Waxing (per 1000 CDs)	
Print cover	
Others (please specify)	

ED3 - How many albums do you sell in a year?			
	CD		**Cassette**
☐01	None	☐01	None
☐02	1 – 1000	☐02	1 – 1000
☐03	1001 – 2000	☐03	1001 – 2000
☐04	2001 – 3000	☐04	2001 – 3000
☐05	3001 – 4000	☐05	3001 – 4000
☐06	4001 – 5000	☐06	4001 – 5000
☐07	Above 5000	☐07	Above 5000

ED5 - How much do you charge to perform live?	
In Ghana	
Abroad	

ED8 - How much do you earn from the following in a year?	
Merchandising	
Advertisements	
Sponsorships	
Royalties	

ED14 - How do you finance your activities and can you indicate the percentage in the following category?		
	Category	**Percentage**
☐01	Self-financing	
☐02	Loan from bank	
☐03	Loan from friend	
☐04	Sponsorship	
☐05	Other	

General information

GI1 - What are the major strengths of the industry?

GI2 - Kindly indicate the level of seriousness for each of the following challenges. 1 – Very Serious, 2 – Serious, 3 – Not Serious	
Criteria	**Level of Seriousness**
Limited teaching of music in the school system	
Limited retail distribution channels	
Payola deprives right holders of their income	
Lack of unity in the industry	
Piracy	
Lack of accountability and transparency with copyright	
Trust related problems between musicians and managers	
Lack of access to finance	
Lack of music equipment/instruments	
Lack of technology	

GI3 - Are there any other challenges and what recommendations do you have for the industry?

A Study of the Music Sector in Ghana
Questionnaire for Wood Carvers

Serial No:

Personal Data

Interviewee's Address (Optional)	
City of residence	
Name of interviewee	
Telephone number	

PD1- Age?	
☐01	Less than 25 years
☐02	25 to 29 years old
☐03	30 to 34 years old
☐04	35 to 45 years old
☐05	Above 45

PD2 - Gender	
☐01	Male
☐02	Female

PD3 - Marital status?	
☐01	Married
☐02	Single
☐03	Divorced
☐04	Widowed
☐05	Other (please specify)

PD4 - How many dependants do you have?	
☐01	1
☐02	2
☐03	3
☐04	4
☐05	5
☐06	Over 5
☐07	None

PD5 - Level of education	
☐01	Primary
☐02	Secondary
☐03	Tertiary
☐04	None
☐05	Other (please specify)

PD6 - Nationality	
☐01	Ghanaian
☐02	Nigerian
☐03	Other African (Please specify)
☐04	Non-African

PD7- What is your working status?	
☐01	Full time
☐02	Part time

Professional Characteristics

PC1 - If instrument manufacturer, what types of Ghanaian instruments do you manufacture? **(multiple aided question)**	
☐01	Drums (Dondo, Atumpan, Fontomfrom etc)
☐02	Xylophone
☐03	Atenteben
☐04	African lute
☐05	Harp lute (Seperewa)
☐06	Bamboo flutes and whistles
☐07	Horns
☐08	Cowbells/Gongong
☐09	Maracas/Shakers
☐10	Claves
☐11	Other (Please specify)

PC2 - In which region(s) are you located?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

PC3- For how long have you been in operation?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 15 years
☐05	Above 15 years

PC4 - How many instruments are you able to sell in a year?	
Instrument	**Number**
Drums (Dondo, Atumpan, Fontomfrom etc)	
Xylophone	
Atenteben	
African lute	
Harp lute (Seperewa)	
Bamboo flutes and whistles	
Horns	
Cowbells/Gongong	
Maracas/Shakers	
Claves	
Other (Please specify)	

PC5 - Do you export any of your products?	
☐01	Yes
☐02	No

PC6 - If yes to above, what percentage of your products do you export?	
☐01	Less than 10%
☐02	Less than 20%
☐03	Less than 30%
☐04	Less than 40%
☐05	Less than 50%
☐06	Over 50%

PC7 - How much do you earn in a year from export?	
Amount	

PC8 - Which government policies support/inhibit your export business and how can it be improved?

Economic Characteristics

EC1 - How much does it cost to manufacture a single instrument?	
Instrument	**Amount (GH¢)**
Drums (Dondo, Atumpan, Fontomfrom etc)	
Xylophone	
Atenteben	
African lute	
Harp lute (Seperewa)	
Bamboo flutes and whistles	
Horns	

Cowbells/Gongong	
Maracas/Shakers	
Claves	
Other (Please specify)	

EC2 - What is the average selling price of an instrument?	
Instrument	**Amount (GH¢)**
Drums (Dondo, Atumpan, Fontomfrom etc)	
Xylophone	
Atenteben	
African lute	
Harp lute (Seperewa)	
Bamboo flutes and whistles	
Horns	
Cowbells/Gongong	
Maracas/Shakers	
Claves	
Other (Please specify)	

EC3 - Do you teach how to play any musical instrument and/or dancing?	
☐01	Yes
☐02	No

EC4 - What is the average number of persons you train in a year?

EC5- What is the average cost to a person who is learning how to play an instrument and/or dancing?

EC6- Do you have other sources of income?	
☐01	Yes
☐02	No

EC7 - If ‘Yes’ to above, please indicate the sources/activities from which you generate other income?

EC8 - If yes to above, what percentage of your income comes from music/instrument production?	
Percentage	

EC9 - How do you finance your activities and can you indicate the percentage in the following category?		
	Category	**Percentage**
☐01	Self-financing	
☐02	Loan from bank	
☐03	Loan from friend	

☐04	Sponsorship	
☐05	Other	

EC10 - Please indicate the cost per year for the following items (using 2012 as a reference year)?	
Type	**Amount (Ghana cedis)**
Raw materials	
Staff salaries	
Office rent	
Electricity	
Fuel	
Tax	
Transportation	
Other (specify)	

EC11 – Please provide us with the estimated value of your business assets?	
Buildings	
Equipment	
Vehicles	
Other (specify)	

General information

GI1 - What do you see as the biggest challenge/major weakness in your particular end of the music industry? (This includes policies/regulatory frameworks that inhibit your work)

GI2 - What are the major strengths of the industry? (This includes policies/regulatory frameworks that support your work)

GI3 - What recommendations/expectations do you have, particularly for your sector?

A Study of the Music Sector in Ghana
Questionnaire for Studio Managers/Operators, Sound Engineers & Film Makers/Producers

Serial No:

Personal Data

Interviewee's Address (Optional)	
Street name	
Name of Studio	
Telephone number	

SM1- Age?	
☐01	Less than 25 years
☐02	25 to 29 years old
☐03	30 to 34 years old
☐04	35 to 45 years old
☐05	Above 45

SM2 - Gender	
☐01	Male
☐02	Female

SM3 - Marital status?	
☐01	Married
☐02	Single
☐03	Divorced
☐04	Widowed
☐05	Other (please specify)

SM4 - How many dependants do you have?	
☐01	1
☐02	2
☐03	3
☐04	4
☐05	5
☐06	Over 5
☐07	None

SM5 - Level of education	
☐01	Primary
☐02	Secondary
☐03	Tertiary
☐04	None
☐05	Other (please specify)

SM6 - Nationality	
☐01	Ghanaian
☐02	Nigerian
☐03	Other African (Please specify)
☐04	Non-African

Professional Data

PD1- Please indicate which category you belong to?	
☐01	Studio Manager/Operator
☐02	Sound Engineer
☐03	Music Video Creator/Producer
☐04	Film maker/producer (feature films and documentaries)
☐05	Other (please specify)

PD2 - Do you have any education/training in recording/the making of films/videos?	
☐01	Yes
☐02	No

PD3 - If Yes above, at what level?

☐01	Secondary
☐02	Tertiary
☐03	Others (please specify)

PD4 - If Yes PD2, where was the training?	
☐01	Government school/University
☐02	Private institution/school
☐03	NGO
☐04	Apprenticeship/On the job learning
☐06	Others (please specify)

PD5- How long has the studio/production been in existence?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 20 years
☐05	Over

PD6 - What is your current status in this profession?	
☐01	Full-time
☐02	Part-time

PD7 - Where do you operate from/where are you based?	
☐01	Ghana
☐02	Abroad
☐03	Both

PD8 - If based in Ghana, which region/regions do you operate from? **(Multiple aided question)**	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

PD9 - If operating from abroad could you indicate the reason why? (**multiple aided question**)	
☐01	Better organized music industry
☐02	Supportive regulatory environment / policies
☐03	Easy access to financial support
☐04	Access to new technology
☐05	Access to larger market
☐06	Higher return on investment
☐07	State of the art venues
☐08	Better training/educational facilities
☐09	Other (Please specify)

(Questions PD10 and PD15 are to be filled by Music Video Creators/Producers and Film Makers/Producers. If you are neither, please move to question PD16)

PD10 - Where do you usually shoot your videos?

☐01	Ghana
☐02	Abroad
☐03	Both

PD11 - If shooting videos from abroad could you indicate the reason why? (**multiple aided question**)	
☐01	Easy access to technical and skilled capacity
☐02	Access to new technology
☐03	Videos shot abroad sell better and faster
☐04	Videos shot abroad appeals to the foreign market
☐05	Easy access to state of the art venues and locations
☐06	More preferred by musicians and their producers
☐07	Easy access to equipment and logistics
☐08	Others (Please specify)

PD12 - What percentage or component of film time is connected with the musical sound track?	
Total movie run time	
Percentage of musical sound track run time	

PD13 - How much or what proportion/percentage of the total film budget is directly connected with the musical sound track?	
Total film budget	
Percentage of budget dedicated to music sound track	

PD14 - Do some of your films/videos include actual musicians playing for some shots?	
☐01	Yes
☐02	No

PD15 - Indicate how much it costs you to hire the following services?	
Composer	
Performer/Band	
Editing and synchronizing the soundtrack and picture	

PD16- Please indicate how many of the following persons work in the studio?

	Number of persons	**Nationality (Ghanaian, Nigerian, Other African & Non-African)**
Manager		
Studio Engineer		
Studio Assistant		
Production Manager		
Location Manager		
Lighting Technician		
Director		
Camera Man		
Audio Man		
Others (please specify)		

PD17 - Please indicate the average salary per year for the following persons working in the studio?

Position	**Amount (Ghana cedis)**
Manager	
Studio Engineer	
Studio Assistant	
Production Manager	
Location Manager	

Lighting Technician	
Director	
Camera Man	
Audio Man	
Others (please specify)	

PD18 - Indicate what proportion/percentage of your recordings/creation is made up of the following genre?	
Hip-life	
Classic highlife (Old time)	
Contemporary highlife (Modern)	
Choral	
Art music	
Gospel	
Traditional/folkloric	
Reggae	
Jazz	
Film/Video music	
Afro Beat/Afro Rock/Afro Jazz	
Classic	
Brass Band	
Other (Please specify)	

PD19 - How many recordings/music videos/films do you make in a year?	
Average number	

PD20 - How much does it cost you to record a single track or to shoot a video for a song?	
Average amount	

PD21 - Indicate the percentage breakdown of your cost per the following items.	
Electricity	
Salary	
Space Rental	
Fuel	
Instrument Hiring	
Master CD	
Chairs	
Other	

PD22 - Please kindly provide an estimate of the following assets where applicable.	
Item	**Amount (Ghana cedis)**
Building (purchase value/rental value)	
Equipment (instruments, computers, etc)	
Other assets (vehicles, etc)	

PD23 - How much do you charge to record a single track or to shoot a video for a song?	
Average amount	

PD24 - What factors account for this charge?

PD25 - Do you have other sources of income aside operating a studio/video production?	
☐01	Yes
☐02	No

PD26 - Which activities are you involved in aside operating a studio?

PD27 - If yes above, how much do you earn from other sources?	
Amount	

PD28 - How do you finance your activities and can you indicate the percentage in the following category?		
	Category	**Percentage**
☐01	Self-financing	
☐02	Loan from bank	
☐03	Loan from friend	
☐04	Sponsorship	
☐05	Other	

General information

GI1 - What are the major challenges you face in your area of operation?

GI2 - What are the major strengths/recent developments you identify in the industry?

GI3 - What are the tactics/new business models you are considering?

GI4 - What recommendations do you have for the industry?

A Study of the Music Sector in Ghana
Questionnaire for Venue Owners/Operators

Serial No:

Interviewee's Address (Optional)	

City of Residence	
Name of Venue	
Telephone number	

Venue Characteristics

VC1- What type of venue do you operate?	
☐01	Night club
☐02	Beach resort
☐03	Drumming/Music/Dance School
☐04	Cultural centres
☐05	Foreign embassies and their cultural locations (Goethe, Alliance Française, etc)
☐06	Parks, gardens, open-air, trade fair sites or amusement parks
☐07	Hotel/Restaurant
☐08	School and university venues and grounds
☐09	Street events/carnivals
☐10	Others (please specify)

VC2 - How long have you been in operation?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 20 years
☐05	Over

VC3 - Have you obtained an operating license from GHAMRO?	
☐01	Yes
☐02	No

VC4 - If 'No' to above, could you please explain why?

VC5 - What types of shows are organized at your venue? **(multiple-aided question)**	
☐01	Live performances (for seated audience)
☐02	Live performances (for dance floors)
☐04	Music competitions
☐05	Exhibitions (fashion, musical, traditional, etc)
☐06	Street festivals
☐07	Concert parties
☐08	Ballet and contemporary dance shows
☐09	Traditional/Cultural/folkloric shows
☐10	Theatrical productions
☐11	Music awards
☐12	Others (please specify)

VC6 - What proportion of these shows are commercial (that earn income) and what proportion are not commercial (for leisure)?	
Commercial	
Non-commercial	

VC7- If your venue also organises shows/events, how much does it cost you to organise a show?

Type of show	**Average organisational cost**
Live performances (for seated audience)	

Live performances (for dance floors)	
Music competitions	
Exhibitions (fashion, musical, traditional, etc)	
Street festivals	
Concert parties	
Ballet and contemporary dance shows	
Traditional/Cultural/folkloric shows	
Theatrical productions	
Music awards	
Others (please specify)	

VC8 - What is your average ticket charge per show (if applicable)?	
Type of show	**Average price of ticket per show**
Live performances (for seated audience)	
Live performances (for dance floors)	
Music competitions	
Exhibitions (fashion, musical, traditional, etc)	
Street festivals	
Concert parties	
Ballet and contemporary dance shows	
Traditional/Cultural/folkloric shows	
Theatrical productions	
Music awards	
Others (please specify)	

VC9 - How many of these shows are organized at your venue in a year?	
Type of Show	**Average number within a year**
Live performances (for seated audience)	
Live performances (for dance floors)	
Music competitions	
Exhibitions (fashion, musical, traditional, etc)	
Street festivals	
Concert parties	
Ballet and contemporary dance shows	
Traditional/Cultural/folkloric shows	
Theatrical productions	
Music awards	
Others (please specify)	

VC10 - If you invite groups of artistes to perform, how much do you pay a group per show?		
		Average amount paid to a group per show
Group	☐01	Less than 1000
	☐02	1000 – 1999
	☐03	2000 – 2999
	☐04	3000 – 3999
	☐05	Above 4000

VC11- If you invite individual artistes to perform, how much do you pay an artiste per show?		
		Amount paid to an individual artist per show
Individual Artiste	☐01	Less than 1000
	☐02	1000 – 1999
	☐03	2000 – 2999

	☐04	3000 – 3999
	☐05	Above 4000

VC12- Does your venue have already fitted equipments/logistics?	
☐01	Yes
☐02	No

VC13- If 'Yes' to above, what types of equipment are fitted at your venue?	
☐01	PA system
☐02	Musical Instruments
☐03	Lighting systems
☐04	Others (please specify)

VC14- If 'No' to above, how much does it cost you to hire equipments?	
Type of equipment	**Average amount**
PA system	
Musical Instruments	
Lighting systems	
Others (please specify)	

VC15 - What type of audience do you mainly receive?	
☐01	Ghanaian
☐02	Foreign tourists
☐03	Mixture of Ghanaian and foreign tourists

VC16 - If a mixture of Ghanaian and foreign tourists, what percentage of the audience are Ghanaian?	
☐01	10% or less
☐02	11% - 20%
☐03	21% - 30%
☐04	31% - 40%
☐05	41% - 50%
☐06	Above 50%

VC17 - What is the reason for attracting this type of audience?

VC18- How much do you charge to rent out your venue per day?	
☐01	Less than 500
☐02	500 – 1000
☐03	1001 – 2000
☐04	2001 – 3000
☐05	3001 – 4000
☐06	4001 – 5000
☐07	More than 5000

VC19 – What percentage of your income from venue rental is from music related activities? (2012 as reference year)	
Percentage/Proportion	

VC20 – How much does it cost you to maintain your venue?	
Cost item	**Amount**
Building and infrastructure maintenance	

Bills (Electricity, rent, etc)	
Salaries	
Average annual cost of maintenance	

General information

GI1 - What are the major strengths of the industry?

GI2 - What are the major weaknesses/challenges of the industry?

GI3 - What tactics/new business models are considering, particularly to attract audience to music shows?

GI4 - What recommendations do you have for the industry?

A Study of the Music Sector in Ghana
Questionnaire for the Spinners

Serial No:

Personal Data

Interviewee's Address (Optional)	
City of Residence	
Name of interviewee	
Telephone number	

PD1- Age?	
☐01	Less than 25 years
☐02	25 to 29 years old
☐03	30 to 34 years old
☐04	35 to 45 years old
☐05	Above 45

PD2 - Gender	
☐01	Male
☐02	Female

PD3 - Level of education	
☐01	Primary
☐02	Secondary

☐03	Tertiary
☐04	None
☐05	Other (please specify)

PD4 - Marital status?	
☐01	Married
☐02	Single
☐03	Divorced
☐04	Widowed
☐05	Other (please specify)

PD5 - How many dependents do you have?	
☐01	1
☐02	2
☐03	3
☐04	4
☐05	5
☐06	Over 5

Professional Characteristics

PC1 - Do you have any education/training in spinning?	
☐01	Yes
☐02	No

PC2 - If so, at what level?	
☐01	Secondary
☐02	Tertiary
☐03	Others (please specify)

PC3 - What is your current status in this profession?	
☐01	Full-time
☐02	Part-time

PC4 - What types of shows do you spin under?	
☐01	Funerals
☐02	Parties
☐03	Competitions
☐04	Street carnivals
☐05	Outdoorings and marriages
☐06	Self-hiring of dance halls and spaces
☐07	Traditional type festivals
☐08	Modern type festivals
☐09	Others (please specify)

PC5- How long have you been in operation?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 15 years
☐05	Above 15 years

PC7 - In which regions do you operate?

☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Easter
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

PC8 - What proportion of your spins constitute playing Ghanaian music?	
☐01	Less than 10%
☐02	10 to 20%
☐03	21 to 30%
☐04	31 to 40%
☐05	41% to 50%
☐06	Over 50%

PC9 - Which of the genres below do you play the most?	
☐01	Hip-life
☐02	Classic highlife (Old time)
☐03	Contemporary highlife (Modern)
☐04	Choral
☐05	Art music
☐06	Gospel
☐07	Traditional/folkloric
☐08	Reggae
☐09	Jazz
☐10	Film/Video music
☐11	Afro Beat/Afro Rock/Afro Jazz
☐12	Brass Band
☐13	Western
☐14	Other (Please specify)

PC10 - How many shows are you able to run in a year?	
Number	

PC11 - What is the usual size of your audience?	
Number	

PC14 - How much do you usually charge per show?	
Funerals	
Parties	
Competitions	
Street carnivals	
Outdoorings and marriages	
Self-hiring of dance halls and spaces	
Traditional type festivals	
Modern type festivals	
Others (please specify)	

PC15 - How much does it cost to organize a show?

Funerals	
Parties	
Competitions	
Street carnivals	
Outdoorings and marriages	
Self-hiring of dance halls and spaces	
Traditional type festivals	
Modern type festivals	
Others (please specify)	

PC16 - What accounts for this cost?

PC17 - Do you own your own logistics and equipments?	
☐01	Yes
☐02	No

PC18 - If yes, what logistics and equipment do you own?

PC19 - What is the value of your assets?	
Building	
Equipment	
Vehicles	
Other (specify)	

PC20 - If no, how much does it cost to rent the equipment and logistics?	
☐01	Yes
☐02	No

VC3 - Have you obtained an operating license from Ghana Music Rights Organization (GHAMRO)?	
☐01	Yes
☐02	No

MD9 - If 'No' to above, what are the reasons?

MD9 - Do you pay royalties to Ghana Music Rights Organization (GHAMRO)?	
☐01	Yes
☐02	No

MD10 - If yes above, how often do you pay royalties?	
☐01	Monthly
☐02	Yearly
☐03	As and when demanded
☐04	Seldom
☐05	Others (please specify)

MD10 - How much do you pay as royalties on the average within the period you have stated above?	
☐01	2000 or less
☐02	2001 to 4000
☐03	4001 to 6000
☐04	6001 to 8000
☐05	8001 to 10000
☐06	Above 10000

MD11 - If no to question MD9, can you give reasons?	
☐01	Do not know royalties must be paid
☐02	Do not who to pay to
☐03	Unwilling to pay
☐04	Other (please specify)

PC25 - How much do you earn per year from spinning?	
Average amount (GHC)	

PC26 - Do you have other sources of income aside spinning?	
☐01	Yes
☐02	No

PC27 - If yes above what percentage/proportion of your income comes from spinning?	
Amount	

PC28 - What are the other activities you are involved in aside spinning?

PC29 - Do you belong to any spinners association(s)?	
☐01	Yes
☐02	No

PC30 - If yes to PC33, which one(s) do you belong to?

PC31 - How many people do you employ?	
Number	

PC32 - How many of these employees' work are music related?	
Number	

PC33 - How much do you pay your employees?	
Amount (please provide a range)	

General information

GI1 - What informs the choice of song during your daily spinning?

GI2 - What are the major strengths of the industry? (This includes policies/regulatory frameworks that support your work)

GI3 - What challenges do you face in your work as a Spinner? (This includes the major weaknesses of the music sector including policies/regulatory frameworks that pose as a risk to your business)

GI4 - What recommendations do you have for the industry?

A Study of the Music Sector in Ghana

Questionnaire for Media Houses & Telecommunications Companies

Serial No:

Interviewee's Address (Optional)	
Street name	
Name of interviewee	
Name of entity	
Telephone number	

MD1- Which of the following professional categories do you belong to?	
☐01	Radio station
☐02	TV station
☐03	Telecom company
☐04	Other (Please specify)

MD2- How long have you been in operation?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 15 years
☐05	Above 15 years

MD3 - In which of the following regions does your coverage reach? (**Multiple-aided)**	
☐01	Greater Accra
☐02	Central

☐03	Western
☐04	Easter
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

VC3 - Have you obtained an operating license from Ghana Music Rights Organization (GHAMRO)?	
☐01	Yes
☐02	No

MD9 - If 'No' to above, what are the reasons?

MD9 - Do you pay royalties to Ghana Music Rights Organization (GHAMRO)?	
☐01	Yes
☐02	No

MD10 - If yes above, how often do you pay royalties?	
☐01	Monthly
☐02	Yearly
☐03	As and when demanded
☐04	Seldom
☐05	Others (please specify)

MD10 - How much do you pay as royalties on the average within the period you have stated above?	
☐01	2000 or less
☐02	2001 to 4000
☐03	4001 to 6000
☐04	6001 to 8000
☐05	8001 to 10000
☐06	Above 10000

MD11 - If no to question MD9, can you give reasons?	
☐01	Do not know royalties must be paid
☐02	Do not who to pay to
☐03	Unwilling to pay
☐04	Other (please specify)

If a Telecom company please move to Part B of this questionnaire

Part A

MD13 - What is the estimated total number of listeners to your station?	
Number	

MD4 - What proportion of your daily air time constitutes playing music?	
☐01	Less than 10%
☐02	10 to 20%
☐03	21 to 30%
☐04	31 to 40%

☐05	41% to 50%
☐06	Over 50%

MD5 - Indicate the music played at your station in percentages according to the following categories?	
Music category	**Percentage**
Ghanaian	
Nigerian	
Other African	
Western	
Others (please specify)	

MD6 - Which of the genres below do listeners prefer the most?	
☐01	Hip-life
☐02	Classic highlife (Old time)
☐03	Contemporary highlife (Modern)
☐04	Choral
☐05	Art music
☐06	Gospel
☐07	Traditional/folkloric
☐08	Reggae
☐09	Jazz
☐10	Film/Video music
☐11	Afro Beat/Afro Rock/Afro Jazz
☐12	Brass Band
☐13	Western
☐14	Other (Please specify)

MD7 - Do you have a logging system?	
☐01	Yes
☐02	No

MD8 - If yes, do you log music played on air?	
☐01	Yes
☐02	No

MD8 - If 'No', what are the reasons?

MD12 - Do you broadcast your feed online?	
☐01	Yes
☐02	No

General information

GI1 - What informs the choice of song during your daily programming?

Part B - Telecoms Companies

TC1 - What is your total subscriber base?	
Number	

TC2 - Which of the following Value Added Services (VAS) do you provide to your customers?	
☐01	Music download
☐02	Caller tunes
☐03	Ringtones
☐04	Others (please specify)

TC3 - Which of the genres below is mostly utilized?	
☐01	Hip-life
☐02	Classic highlife (Old time)
☐03	Contemporary highlife (Modern)
☐04	Choral
☐05	Art music
☐06	Gospel
☐07	Traditional/folkloric
☐08	Reggae
☐09	Jazz
☐10	Film/Video music
☐11	Afro Beat/Afro Rock/Afro Jazz
☐12	Brass Band
☐13	Western
☐14	Other (Please specify)

TC4 - What percentage of your subscribers, subscribe to the following services?	
VAS	**Percentage**
Music download	
Caller tunes	
Ringtones	
Others (please specify)	

TC5 - What is the average number of downloads per year?	
VAS	**Average number**
Music download	
Caller tunes	
Ringtones	
Others (please specify)	

TC6 - How much do you charge per service?	
VAS	**Amount**
Music download	
Caller tunes	
Ringtones	
Others (please specify)	

TC7 - What percentage of downloads are Ghanaian music?	
Percentage	

General information

GI1 - What is your perspective of the Ghanaian music sector and its potential?

GI2 - What are the major strengths of the industry?	

GI3 - What are the major weaknesses of the music sector?	

GI4 - What recommendations do you have for the industry?	

A Study of the Music Sector in Ghana

Questionnaire for Distributors, Music Product Retailers, Digital Download Companies

Serial No:

Interviewee's Address (Optional)	
City of Residence	
Interviewee Name	
Telephone number	

Screening Question

SQ1 - Are you an individual or corporate body?	
☐01	Individual
☐02	Corporate body

If you are a corporate body please go to PC1
Personal data

PD1 - Gender	
☐01	Male
☐02	Female

PD2- Age?	
☐01	Less than 25 years
☐02	25 to 29 years old
☐03	30 to 34 years old
☐04	35 to 45 years old
☐05	Above 45

PD3 - Marital status?	
☐01	Married
☐02	Single
☐03	Divorced
☐04	Widowed
☐05	Other (please specify)

PD4 - How many dependants do you have?	
☐01	None
☐02	1
☐03	2
☐04	3

☐05	4
☐06	5
☐07	Over 5

PC5 - Level of education	
☐01	Primary
☐02	Secondary
☐03	Tertiary
☐04	None
☐05	Other (please specify)

Professional characteristics

PC1- Which of the following professional categories do you belong to? **(Multiple aided)**	
☐01	Distributor
☐02	Cassette and CD seller
☐03	Music retailer
☐04	Digital Download Company
☐05	Other (Please specify)

PC2 - What is your current status in this profession?	
☐01	Full-time
☐02	Part-time

PC3 - How long have you been in operation?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 15 years
☐05	16 to 20 years
☐06	21 to 25 years
☐07	Over 25 years

PC4 - What is the nature of your current operations?	
☐01	As a formal establishment
☐02	As an individual

PC5 - Where do you operate from?	
☐01	Music shop
☐02	Kiosk
☐03	Van
☐04	Office space
☐05	Online/digital platform
☐06	Event grounds (eg festivals, etc)
☐07	Others (please specify)

PC6 - Where are your operations based?	
☐01	Ghana
☐02	Other African countries
☐03	America
☐04	Asia
☐05	Australia
☐06	Europe

PC7 - Please indicate the number of outlets you operate in the regions you indicated in PC6 above?	
Region	**Number of outlets**
Ghana	
Other African countries	
America	
Asia	
Australia	
Europe	

PC8 - If you operate from abroad could you indicate the reason why? (**multiple aided question**)	
☐01	Better organized music industry
☐02	Supportive regulatory environment / policies
☐03	Easy access to financial support
☐04	Access to new technology
☐05	Access to larger market
☐06	Higher return on investment
☐07	Better distribution channels
☐08	Other (Please specify)

PC9 - If you operate from Ghana, in which region(s) are you located?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

PC10 - Which kinds of music do you distribute?	
☐01	Ghanaian
☐02	Other African
☐03	American
☐04	Asian
☐05	Australian
☐06	European
☐07	Others (please specify)

PC11 - What distribution/retail methods do you adopt?

PC12 - Which of these genres do you distribute or retail? **(Multiple-aided)**	
☐01	Hip-life
☐02	Classic highlife (Old time)
☐02	Contemporary highlife (Modern)
☐03	Choral
☐04	Art music

☐05	Gospel
☐06	Traditional/folkloric
☐07	Reggae
☐08	Jazz
☐09	Film/Video music
☐10	Afro Beat/Afro Rock/Afro Jazz
☐11	Brass Band
☐12	Other (Please specify)

PC13 - Which of the following genres is distributed more easily?	
☐01	Hip-life
☐02	Classic highlife (Old time)
☐02	Contemporary highlife (Modern)
☐03	Choral
☐04	Art music
☐05	Gospel
☐06	Traditional/folkloric
☐07	Reggae
☐08	Jazz
☐09	Film/Video music
☐10	Afro Beat/Afro Rock/Afro Jazz
☐11	Brass Band
☐12	Other (Please specify)

PC14 - Which do you distribute/retail most?	
☐01	CD
☐02	Cassette
☐03	Web/digital distribution
☐04	Music videos
☐05	Others (please specify)

PC15 - Do you attend any music/artiste promotion events?	
☐01	Yes
☐02	No

Economic characteristics (Please provide all currencies in Ghana Cedis)

EC1 – Do you have other sources of income aside music distribution/retail?	
☐01	Yes
☐02	No

EC2 - If yes above what percentage of your income comes from music distribution/retail?	
Percentage (%)	

EC3 - How many albums do you distribute/retail in a year?		
Product	**a. Ghana**	**b. Abroad**
CD		
Cassette		
Web/digital distribution		
Music videos		
Others (please specify)		

EC4 - How many albums have you distributed/retailed since you have been in operation?		
Product	**a. Ghana**	**b. Abroad**
CD		
Cassette		
Web/digital distribution		
Music videos		
Others (please specify)		

EC5 - How much does it cost to distribute/retail an album? (Please provide answers in Ghana Cedis)		
Product	**a. Ghana**	**b. Abroad**
CD		
Cassette		
Web/digital distribution		
Music videos		
Others (please specify)		

EC6 - Distribute the cost for the most expensive product above according to the following factors.	
Cost item	**Amount**
Space	
Rent	
Electricity	
Labour	
Transportation and fuel costs	
Tax	
Others (please specify)	
Total	

EC7 - What is your estimated total sales/turnover in a year? **(Please indicate where applicable)**	
Distributor	
Cassette and CD seller	
Music retailer	
Digital Download Company	
Other (Please specify)	
Total	

EC8 - What is the proportion of music/music product sales according to the various regions?	
Ghana	
Other African countries	
America	
Asia	
Australia	
Europe	

General information

GI1 - What are the major strengths/recent developments of the industry? (This includes policies/regulatory frameworks that support your work)

GI2 - What challenges do you face in distributing/retailing music in Ghana? (This includes policies/regulatory frameworks that inhibit your work)

GI3 - What recommendations and new distribution models/tactics do you have for the industry, particularly your sector?

A Study of the Music Sector in Ghana
Questionnaire for Consumers (Including Tourists)

Serial No:

Interviewee's Address (Optional)	
Street name	
Name of interviewee	
Telephone number	

Personal data

PD1 - Gender?	
☐01	Male
☐02	Female

PD2 - Age?	
☐01	Less than 13 years
☐02	13 to 19 years old
☐03	20 to 26 years old
☐04	27 to 33 years old
☐05	34 to 40 years old
☐06	41 to 47 years old
☐07	48 to 55 years old
☐08	Older than 55 years old

PD3 - Origin?	
☐01	Ghanaian
☐02	Nigerian
☐03	Other African
☐04	European
☐05	Asian
☐06	American
☐07	Australian
☐08	Other (Please specify)

PD4 - Which of the following categories do you belong to?	
☐01	Resident Ghanaian
☐02	Non-resident Ghanaian on a business trip
☐03	Non-resident Ghanaian on tour (Tourist)
☐04	Foreign national on tour (Tourist)
☐05	Foreign national residing in Ghana
☐06	Foreign national on a business trip
☐07	Others (please specify)

PD5 - Which region are you based in?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

Consumer characteristics

CC1 - Do you like Ghanaian music?	
☐01	Yes
☐02	No

CC2 - If Yes to CC1 above, which of the following genres do you like? **(Multiple aided question)**	
☐01	Hip-life
☐02	Classic highlife (Old time)
☐03	Contemporary highlife (Modern)
☐04	Choral
☐05	Art music
☐06	Gospel
☐07	Traditional/folkloric
☐08	Reggae
☐09	Jazz
☐10	Film/Video music
☐11	Afro Beat/Afro Rock/Afro Jazz/Afro pop
☐12	Brass Band
☐13	Classical
☐14	Other (Please specify)

CC3 - If No to CC1above, what are your reasons? **(Multiple aided question)**	
☐01	Language too localized
☐02	Not appealing to listen
☐03	Songs do not carry any message
☐04	Poorly produced music
☐05	Lyrical content not appealing
☐06	Others (please specify)

CC4 - How did you first get exposed to Ghanaian music?	
☐01	Radio
☐02	CDs
☐03	Cassette
☐04	Live music
☐05	Public venues/places
☐06	Television
☐07	Internet
☐08	Portable media device
☐09	Others (please specify)

CC5 - Which of the following is your preferred form of listening to music?	
☐01	Radio
☐02	CDs
☐03	Cassette
☐04	Live music
☐05	Public venues/places
☐06	Television
☐07	Internet
☐08	Portable media device
☐09	Others (please specify)

CC6 - How do you acquire Ghanaian music	
☐01	CD/cassette purchase
☐02	Purchasing from online stores
☐03	Copying from friends
☐04	Mobile downloads
☐05	Gifts
☐06	Others (please specify)

CC7 - Do you know the difference between original and pirated music products?	
☐01	Yes
☐02	No

CC8 – If yes above how do you identify the difference?	
☐01	Packaging
☐02	Quality of song
☐03	Price of the CD/cassette
☐04	Selling outlet
☐05	Other (please specify)

CC9 - Do you acquire pirated copies of the music you obtain?	
☐01	Yes
☐02	No

CD10 - Do you attend live shows?	
☐01	Yes
☐02	No

CD11 - If answer to above is no, what are your reasons?	
☐01	Tickets are too expensive
☐02	Shows are not attractive
☐03	Venues are not attractive
☐04	Artistes do not give value for money
☐05	Other (please specify)

CD12- Which of the following is your preference? **(Multiple aided question)**	
☐01	Night club
☐02	Beach party
☐03	Hotels
☐04	Street festivals/Carnivals
☐05	TV shows

☐06	Rituals (outdooring and funerals)
☐07	Religious event
☐08	Major concerts (music awards, night of a 1,000 laughs and music, national music shows, etc)
☐09	Other (please specify)

CD13- How many of the following do you attend in a year? **(Multiple aided question)**	
Night club	
Beach party	
Hotels	
Street festivals/Carnival	
TV shows	
Rituals (outdooring and funerals)	
Religious event	
Major concerts (music awards, night of a 1,000 laughs and music, national music shows, etc)	
Other (please specify)	

CD14 - Are you taking any formal or informal education in music?	
☐01	Yes
☐02	No

CD15 - What type of instrument do you have? **(Multiple aided question)**	
☐01	None
☐02	Drum
☐03	Traditional wind or string instrument
☐04	Guitar
☐05	Keyboard instruments
☐06	Organ
☐07	Pipe
☐08	Other (please specify)

CD16- Have you or do you intend to purchase musical instrument?	
☐01	Yes
☐02	No

Economic characteristics

EC1- What is your estimated expenditure on all music related activities in (please use 2012 as a reference year)?	
Amount	

EC2 - What percentage of the expenditure was spent on Ghanaian music?	
Percentage	

EC3- Can you give the percentage breakdown of your expenditure in the following?

Expenditure item	**Percentage**
Ticket to live shows	
Purchase of CDs or cassettes	
Purchase of musical instruments	
Purchase of dresses and accessories (makeup etc)	
Purchase of souvenirs	
Online purchase	
Others (please specify)	
TOTAL	**100%**

EC4 - Which of the following annual income brackets do you belong to?	
☐01	Less than 5,000
☐02	5,000 to less than 20,000
☐03	20,000 to less than 35,000
☐04	35,000 to less than 50,000
☐05	50,000 to less than 75,000
☐06	More than 75,000

General information

GI2 - How do you see the Ghanaian music sector and its potential?

CD2 - What recommendations do you have for the sector?

A Study of the Music Sector in Ghana
Questionnaire for Record Labels/Executive Producers

Serial No:

Personal Data

Interviewee's Address (Optional)	
City of residence	
Name of interviewee	
Telephone number	

PD1- Age?	
☐01	Less than 25 years
☐02	25 to 29 years old
☐03	30 to 34 years old
☐04	35 to 45 years old
☐05	Above 45

PD2 - Gender	
☐01	Male
☐02	Female

PD3 - Marital status?	
☐01	Married
☐02	Single
☐03	Divorced
☐04	Widowed
☐05	Other (please specify)

PD4 - How many dependants do you have?

☐01	1
☐02	2
☐03	3
☐04	4
☐05	5
☐06	Over 5
☐07	None

PD5 - Level of education	
☐01	Primary
☐02	Secondary
☐03	Tertiary
☐04	None
☐05	Other (please specify)

PD6 - Nationality	
☐01	Ghanaian
☐02	Nigerian
☐03	Other African (Please specify)
☐04	Non-African

Professional Characteristics

PC1- Which of the following categories applies to you?	
☐01	Executive producer
☐02	Record label
☐03	Distributors
☐04	Publishers
☐05	Others (please specify any other music area within which you are active)

PC7 - Do you belong to any of the following bodies? **(Multiple aided question)**	
☐01	Musicians Union of Ghana (MUSIGA)
☐02	Association of Music Rights Owners (AMRO)
☐03	Ghana Music Rights Organization (GHAMRO)
☐04	Ghana Association of Phonographic Industries (GAPI)
☐05	Composers and Authors of Music Association (CAMA)
☐06	Ghanaian Association of Composers, Authors and Publishers (GHASCAP)
☐07	Songwriters and Performers Association of Ghana (SPAG)
☐08	Veterans Musicians Association of Ghana (VEMAG)
☐09	Professional Musicians Association of Ghana (PROMAG)
☐10	Record Producer and Publishers Association of Ghana (REPPAG)
☐11	National Association of Ghanaian Music Producers (NASGAMP)
☐12	Other (please specify)

PC2- Which of the following do you produce? **(multiple aided question)**	
☐01	CD
☐02	Cassette

PC3- What is your working status?	
☐01	Full time
☐02	Part time

PC4 - Where do you operate from/where are you based?	
☐01	Ghana

☐02	Abroad
☐03	Both

PC5 - If operating from abroad could you indicate the reason why? (**multiple aided question**)	
☐01	Better organized music industry
☐02	Supportive regulatory environment / policies
☐03	Easy access to financial support
☐04	Access to new technology
☐05	Access to larger market
☐06	Higher return on investment
☐07	Other (Please specify)

PC6 - If operating from Ghana, in which region(s) are you located?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

PC7- For how long have you been in operation?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 15 years
☐05	Above 15 years

PC8 - Which of the following regions account for the largest proportion of your record sales?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

PC9 - What proportion of your production constitutes Ghanaian music?	
☐01	Less than 20%
☐02	20 to 39%
☐03	40 to 59%
☐04	60 to 79%
☐05	80% and above

PC10 - What genre of Ghanaian music do you produce? **(multiple aided question)**

☐01	Hip-life
☐02	Classic highlife (Old time)
☐03	Contemporary highlife (Modern)
☐04	Choral
☐05	Art music
☐06	Gospel
☐07	Traditional/folkloric
☐08	Reggae
☐09	Jazz
☐10	Film/Video music
☐11	Afro Beat/Afro Rock/Afro Jazz
☐12	Brass Band
☐13	Western
☐14	Other (Please specify)

PC11 - What is the average number of albums you produce in a year?	
☐01	1
☐02	2
☐03	3
☐04	4
☐05	5
☐06	Above 5

PC12 - Do you export any of your products?	
☐01	Yes
☐02	No

PC13 - If yes to above, what percentage of your products do you export?	
☐01	Less than 10%
☐02	10% - 20%
☐03	20% - 30%
☐04	30% - 40%
☐05	40% - 50%
☐06	Above 50%

PC14 - How much do you earn in a year from export?	
Amount	

PC15 - Which government policies support/inhibit your export business and how can it be improved?

Economic Characteristics

ED1 - How much does each of the following items cost in recording a single track?	
Cost Item	**Amount**
Studio engineer	
Backing vocalist	
Guitarist	
Video clip	
Artist charge	
Miscellaneous (transportation, telephone calls, etc)	

EC2 - How many tracks do you averagely have on an album?	
CD	
Cassette	

ED5 - How much does each of the following cost in duplicating CDs?	
Stamper	
Waxing (per 1000 CDs)	
Print cover	
Others (please specify)	

ED3 - How many albums do you sell in a year?			
	CD		**Cassette**
☐01	10,000 or less	☐01	10,000 or less
☐02	10,001 to 20,000	☐02	10,001 to 20,000
☐03	20,001 to 30,000	☐03	20,001 to 30,000
☐04	30,001 to 40,000	☐04	30,001 to 40,000
☐05	40,001 to 50,000	☐05	40,001 to 50,000
☐06	Above 50,000	☐06	Above 50,000

EC8 - What is the average selling price of an album?	
CD	
Cassette	

EC11- How long does it take to get a return on your investment?	
Number of years	

EC12 - Do you have other sources of income?	
☐01	Yes
☐02	No

EC13 - Please indicate the sources/activities from which you generate other income?

EC14 - If yes to **EC12** above, what percentage of your income comes from music production?	
☐01	10% or less
☐02	11% to 20%
☐03	21% to 30%
☐04	31% to 40%
☐05	41% to 50%
☐06	Above 50%

EC15 - How do you finance your activities and can you indicate the percentage in the following category?		
	Category	**Percentage**
☐01	Self-financing	
☐02	Loan from bank	
☐03	Loan from friend	
☐04	Sponsorship	
☐05	Other	

GI2 - Kindly indicate the level of seriousness for each of the following challenges. 1 – Very Serious, 2 – Serious, 3 – Not Serious	
Criteria	**Level of Seriousness**
Limited teaching of music in the school system	
Limited retail distribution channels	
Payola deprives right holders of their income	
Lack of unity in the industry	
Piracy	
Lack of accountability and transparency with copyright	
Trust related problems between musicians and managers	
Lack of access to finance	
Lack of music equipment/instruments	
Lack of technology	

General information

GI1 - What do you see as the biggest challenge/major weakness in your particular end of the music industry? (This includes policies/regulatory frameworks that inhibit your work)

GI2 - What are the major strengths of the industry? (This includes policies/regulatory frameworks that support your work)

GI3 - What recommendations/expectations do you have, particularly for your sector?

A Study of the Music Sector in Ghana
Questionnaire for Choral Groups

Serial No:

Interviewee's Address (Optional)	
Region of Residence	
Street name	
Name of Group/Band	
Telephone number	

Group Data

CG1- How long has the group been in existence?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 20 years
☐05	Over

CG2 - Please indicate the region in which the group is located?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

CG3 - What is the group's total membership?	
Number	

CG3a - Indicate the gender composition of the group	
☐01	All male
☐02	All female
☐03	Mixed

CG3a – If gender composition is mixed, what is the percentage composition of females in the group?	
☐01	Less than 10%
☐02	Less than 20%
☐03	Less than 30%
☐04	Less than 40%
☐05	Less than 50%
☐06	Over 50%

CG4 - Do you belong to any of the following bodies?	
☐01	Musicians Union of Ghana (MUSIGA)
☐02	Association of Music Rights Owners (AMRO)
☐03	Ghana Music Rights Organization (GHAMRO)
☐04	Ghana Association of Phonographic Industries (GAPI)
☐05	Composers and Authors of Music Association (CAMA)
☐06	Ghanaian Association of Composers, Authors and Publishers (GHASCAP)
☐07	Songwriters and Performers Association of Ghana
☐08	Veterans Musicians Association of Ghana
☐09	Professional Musicians Association of Ghana (PROMAG)
☐10	Record Producer and Publishers Association of Ghana (REPPAG)
☐11	National Association of Ghanaian Music Producers (NASGAMP)
☐12	Other (please specify)

CG5 - Please indicate what proportion of your activities are commercial (that earn income) and the proportion that is not commercial (for leisure)?	
Commercial	
Non-commercial	

CG6 - In which of the following activities do you partake within the year?	
☐01	Studio recording
☐02	National events (NAFAG, PANAFEST, Independence day celebrations, etc)
☐03	Competitions
☐04	TV appearances

☐05	Choral festivals
☐06	Other (Please specify)

CG6 - Please indicate how many of the following activities you partake in within a year?	
Activities	**Number**
Studio recording	
National events (NAFAG, PANAFEST, Independence day celebrations, etc)	
Competitions	
TV appearances	
Choral festivals	
Other (Please specify)	

CG7 - Please indicate how much you charge for the following activities you partake in within a year?	
Studio recording	
National events (NAFAG, PANAFEST, Independence day celebrations, etc)	
Competitions	
TV appearances	
Choral festivals	
Other (Please specify)	

CG8 - Do you compose your own songs?	
☐01	Yes
☐02	No

CG9 - How many songs have you composed since the group's inception?	
Number	

CG11 - Out of the composed songs, how many have you recorded?	
Number	

CG12 - How many albums do you have to your credit?	
Number	

ED1 - How much does each of the following items cost in recording a single track?	
Cost Item	**Amount**
Studio engineer	
Instruments	
Video clip	
Miscellaneous (transportation, telephone calls, etc)	
Others (please specify)	

ED3 - How many albums do you sell in a year?			
	CD		**Cassette**
☐01	None	☐01	None
☐02	1 – 1000	☐02	1 – 1000
☐03	1001 – 2000	☐03	1001 – 2000
☐04	2001 – 3000	☐04	2001 – 3000
☐05	3001 – 4000	☐05	3001 – 4000
☐06	4001 – 5000	☐06	4001 – 5000
☐07	Above 5000	☐07	Above 5000

EC8 - What is the average selling price of an album?

CD	
Cassette	

CG18 - Who produces your music?	
☐01	We produce our own music
☐02	Production company (please specify)

CG21 - Do you own your own instruments?	
☐01	Yes
☐02	No

CG21 - If no to above, how do you obtain instruments?	
☐01	We share with other groups
☐02	We hire them
☐03	Supplied by venue operators (including churches)
☐04	Others (please specify)

CG22 - How much do you earn in a year from the following?	
Advertisements	
Sponsorships	
Merchandising	
Royalties	

CG24 - How do you finance your activities and can you indicate		
	Category	**Percentage**
☐01	Self-financing	
☐02	Loan from bank	
☐03	Loan from friend	
☐04	Sponsorship	
☐05	Other	

General information

CG25 - What are the major strengths of the industry?

CG26 - What are the key challenges?

CG27 - What recommendations do you have for the industry?

A Study of the Music Sector in Ghana
Questionnaire for Artist Managers

Serial No:

Interviewee's Address (Optional)	
City of Residence	
Name of Artist Manager	
Telephone number	

Personal data

PD1 - Gender	
☐01	Male
☐02	Female

PD2- Age?	
☐01	Less than 25 years
☐02	25 to 29 years old
☐03	30 to 34 years old
☐04	35 to 45 years old
☐05	Above 45

PD3 - Marital status?	
☐01	Married
☐02	Single
☐03	Divorced
☐04	Widowed
☐05	Other (please specify)

PD4 - How many dependants do you have?	
☐01	None
☐02	1
☐03	2
☐04	3
☐05	4
☐06	5
☐07	Over 5

Educational background

ED1 - Level of education	
☐01	Primary
☐02	Secondary
☐03	Tertiary
☐04	None
☐05	Other (please specify)

ED2 - Do you have any education/training in managing Artists?	
☐01	Yes
☐02	No

ED3 - If Yes to ED2, at what level?	
☐01	Tertiary
☐02	Others (please specify)

Professional Characteristics

PC1 - What is your current status in this profession?	
☐01	Full-time
☐02	Part-time

PC2 - How is your Artiste management activity established?	
☐01	As a formal establishment
☐02	As an individual

PC3 - Where do you operate from/where are you based?	
☐01	Ghana
☐02	Abroad
☐03	Both

PC4 - If operating from abroad could you indicate the reason why? (**multiple aided question**)	
☐01	Better organized music industry
☐02	Supportive regulatory environment / policies
☐03	Easy access to financial support
☐04	Access to new technology
☐05	Access to larger market
☐06	Higher return on investment
☐07	State of the art venues
☐08	Other (Please specify)

PC5 - If based in Ghana, which region do you operate from?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐03	Brong Ahafo
☐04	Northern
☐05	Upper East
☐06	Upper West

PC6 - For how long have you been in operation?	
☐01	Less than 5 years
☐02	5 to 10 years
☐03	11 to 15 years
☐04	16 to 20 years
☐05	20 to 25 years
☐06	More than 25 years

PC7 - How many artistes are you managing?	
☐01	Less than 5
☐02	5 to 9
☐03	10 to 14
☐04	15 to 19
☐05	More than 20

PC8 - Group the Artistes you manage into the following nationalities.	
Nationality	**Number**
Ghanaian	
Artists of other African origin	
Australian	
European	
Asian	
American	
Total	

PC9 - What is the average period an Artiste spends under your management?	
☐01	Less than 5 years
☐02	5 to 9 years
☐03	10 to 14 years
☐04	15 to 19 years
☐05	More than 20 years

PC10 - What percentage of your working time do you spend on managing Artistes?	
☐01	Less than 25%
☐02	25 to 49%
☐03	50 to 74%
☐04	75 to 100%

PC11 - What types of shows do you arrange for your artistes? (**please tick as many as applies**)	
☐01	Live shows/gigs (clubs, discos, big stadium events, etc)
☐02	Music competitions
☐03	Educational Institutions/University events
☐04	Street festivals & carnivals
☐05	Beach parties
☐06	Music promotions & tours (local/national)
☐07	International music promotions & tours
☐08	State sponsored musical events (NAFAC, PANAFEST, etc)
☐09	TV and radio appearances
☐10	Gospel music shows
☐11	Others (please specify)

PC12 - Do you organise any training programmes?	
☐01	Yes
☐02	No

PC13 - If Yes to PC12 above, how many training programmes do you organize in a year?	
☐01	1
☐02	2
☐03	3
☐04	4

☐05	More than 5

PC14 - How do you find out about events? (**Multiple-aided question)**	
☐01	Radio
☐02	News papers
☐03	News letters
☐04	Web searches
☐05	Association meetings
☐06	Friends
☐07	Television
☐08	Others (please specify)

PC15 - Do you belong to any Union or professional organisation?	
☐01	Yes
☐02	No

PC16 - If Yes to above, what is the name of the organisation?

PC17 - Do you attend any music forums/seminars/workshops as an Artist Manager?	
☐01	Yes
☐02	No

Economic characteristics

EC1 - What is the fee arrangement between you and the artiste?	
☐01	Percentage on fee earned by artiste
☐02	Flat rate per show
☐03	Flat amount per month
☐04	Other (please specify)

EC2 - What is the average fee per artiste (average over last three years) as an Artist Manager?	
Amount	

EC3 - Do you have other sources of income aside managing artistes?	
☐01	Yes
☐02	No

EC4 - If yes above, what percentage/proportion of your total income comes from managing artistes?	
☐01	Less than 25%
☐02	25 to 49%
☐03	50 to 74%
☐04	75 to 100%

EC5 - How much does it cost you to build your career as an Artiste manager?	
Amount	

EC6 - Do you collect performance royalties on behalf of your artiste?	
☐01	Yes
☐02	No

EC7 - If no, who collects performance royalties on behalf of your artiste?	
Name of entity/person	

EC8 - How much does your artist earn from royalties per year?	
Amount	

EC9 - How much does your Artist earn from sponsorships per year?	
Amount	

EC10 - How many people do you employ as music/art related professionals? Eg Booking Agents, Publicist, Marketing, etc		
Category	Number	Amount (please provide an average)

General information

GI1 - What are the major strengths/most recent developments of the industry?

GI2 - What challenges do you face as an artist manager/ what are the challenges you find in the music industry?

GI3 - What new business models/tactics are you adopting or have you identified?

GI4 – How do you help your Artist to produce?

GI5 - What recommendations/expectations do you have for the industry?

A Study of the Music Sector in Ghana
Questionnaire for Educational Institutions

Serial No:

Interviewee's Address (Optional)	
Street name	
Name of interviewee	
Name of institution	
Year of establishment	

Institutional profile

IP1 - Which of the following categories applies to your institution?	
☐01	Public institution
☐02	Private institution
☐03	Other (please specify)

IP2 - Which of the following levels does your institution belong to?	
☐01	Primary
☐02	Secondary
☐03	Tertiary
☐04	Other (please specify)

IP3 - In which region is your institution located?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

IP4 - Are you aware of any Government policies that support music?	
☐01	Yes
☐02	No (If 'No', skip to ME1)

IP5 - If Yes to IP4 above, please indicate those policies?

Music Education

ME1 - Do you have music education as part of your curriculum?	
☐01	Yes
☐02	No

If your answer to question ME1 above is Yes please skip to question ME5. If your answer is No, then answer questions ME2, ME3 and ME4 only.

ME2 - If No above, what are the reasons for the absence of music education from the curriculum? **(Multiple response question)**	
☐01	Not included in the syllabus
☐02	Not relevant for our purpose
☐03	Lack of interest from students/pupils
☐04	Lack of music facilities
☐05	Lack of teachers
☐06	Other

ME3 - Would you like music to be introduced/re-introduced as part of your curriculum?	
☐01	Yes
☐02	No

ME4 - Please provide a comment/remark that explains your answer to question ME3 above.

ME5 - Are the music programmes taught on part-time or fulltime basis?	
☐01	Part-time
☐02	Fulltime
☐03	Both part-time and full-time

ME6 - What teaching methods do you adopt?

ME7 - Do you have adequate teaching materials?	
☐01	Yes
☐02	No

ME8 - What teaching materials do you lack?

ME9 - Do you use any indigenous instruments?	
☐01	Yes
☐02	No

ME10 - If Yes to question ME9 above, what indigenous instruments do you use.

ME11 - If you have music education as part of your programmes, what programmes does your institution offer? **(Multiple aided question)**	
☐01	Learning the use of instruments
☐02	Music composition
☐03	Music production
☐04	Stage performance
☐05	Music marketing
☐06	Music theory and history
☐07	Other (please specify)

ME12 - What percentage of your curriculum constitutes Ghanaian content?	
Programme	**Percentage**
Learning the use of instruments	
Music composition	
Music production	
Stage performance	
Music marketing	
Music theory and history	
Other (please specify)	

ME13 - How many students do you enrol per year according to the various programmes.		
Programmes	**Full-time students**	**Part-time students**
Learning the use of instruments		
Music composition		
Music production		
Stage performance		
Music marketing		
Music theory and history		
Other (please specify)		
Total		

ME14 - How many students graduate per year according to the various programmes.		
Programmes	**Full-time students**	**Part-time students**
Learning the use of instruments		
Music composition		
Music production		
Stage performance		
Music marketing		
Music theory and history		
Other (please specify)		
Total		

ME15 - What proportion of your students are capable of teaching music?	
Percentage	

ME16 - Is there any form of follow-up on graduated students/alumnae?	
☐01	Yes
☐02	No

ME17 - Are alumnae involved in music related professional activities?	
☐01	Yes
☐02	No

ME18 - Which of the following genres do students prefer to receive training in? **(Multiple aided question)**	
☐01	Hip-life
☐02	Classic highlife (Old time)
☐03	Contemporary highlife (Modern)
☐04	Choral
☐05	Art music
☐06	Gospel
☐07	Traditional/folkloric

☐08	Reggae
☐09	Jazz
☐10	Film/Video music
☐11	Afro Beat/Afro Rock/Afro Jazz
☐12	Brass Band
☐13	Other (Please specify)

Economic characteristics

EC1 - What is the average costs of enrolment into each of the music programmes per year?		
Course	**Full-time (GHC)**	**Part-time (GHC)**
Learning the use of instruments		
Music composition		
Music production		
Stage performance		
Music marketing		
Music theory and history		
Other (please specify)		

General information

GI1 - Please summarize the main objectives of your music programme?

GI2 - What challenges do you face in teaching music?

GI3 - What recommendations do you have for the sector?

A Study of the Music Sector in Ghana
Questionnaire for Manufacturers/Manufacturing Houses

Serial No:

Personal Data

Interviewee's Address (Optional)	
City of residence	
Name of interviewee	
Telephone number	

MH1- Which of the following do you manufacture? **(multiple aided question)**	
☐01	CD (blank)
☐02	Cassette (blank)

MH2 - Which of the following services do you provide?	
☐01	CD duplication
☐02	CD replication
☐03	Cassette duplication
☐04	Cassette replication

☐05	Other (please specify)

MH3 - In which region(s) are you located?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

MH4- For how long have you been in operation?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 15 years
☐05	Above 15 years

MH5 - What is the production capacity of your machine per day?	
Type	**Numbers**
Blank CD manufacturing	
Blank cassette manufacturing	
CD duplication	
CD replication	
Cassette duplication	
Cassette replication	
Other (specify)	

MH6 - At what capacity level are you operating?	
Type	**Numbers**
☐01	Less than 25%
☐02	Less than 50%
☐03	Less than 75%
☐04	75% or more

MH7 - How many of the following are you able to produce in a year (using 2012 as a reference year)?	
Type	**Numbers**
Blank CD	
Blank cassette	
CD duplication	
CD replication	
Other (specify)	
Cassette duplication	
Cassette replication	

MH8 - Do you export any of your products?	
☐01	Yes
☐02	No

MH9 - If yes to above, what percentage of your products do you export?	
☐01	Less than 10%
☐02	Less than 20%
☐03	Less than 30%
☐04	Less than 40%
☐05	Less than 50%
☐06	Over 50%

MH10 - How much do you earn in a year from export?	
Amount	

MH11 - Which government policies support/inhibit your export business and how can it be improved?

Economic Characteristics

EC1 - Please indicate how much you charge to duplicate a CD?	
Type	**Amount (Ghana cedis)**
Less than 1,000 CDs	
1,000 – 2,000	
2,001 – 3,000	
3,001 – 4,000	
4,001 – 5,000	
Over 5,000	

EC2 - Please indicate how much you charge to duplicate a Cassette?	
Type	**Amount (Ghana cedis)**
Less than 1,000 cassettes	
1,000 – 2,000	
2,001 – 3,000	
3,001 – 4,000	
4,001 – 5,000	
Over 5,000	

EC3 - Please indicate how much you charge for the following items in replicating CDs?	
Type	**Amount (Ghana cedis)**
Stamper	
Waxing per 1,000 CDs	
Other (specify)	

EC4 - Please indicate the cost of the following items in replicating cassettes?	
Type	**Amount (Ghana cedis)**
Stamper	
Waxing	
Other (specify)	

EC5 - Please indicate the cost per year for the following items (using 2012 as a reference year)?	
Type	**Amount (Ghana cedis)**
Raw materials	
Staff salaries	
Office rent	
Electricity	

Fuel	
Tax	
Transportation	
Other (specify)	

EC6 – Please provide us with the estimated value of your business assets?	
Buildings	
Equipment	
Vehicles	
Other (specify)	

General information

GI1 - What do you see as the biggest challenge/major weakness in your particular end of the music industry? (This includes policies/regulatory frameworks that inhibit your work)

GI2 - What are the major strengths of the industry? (This includes policies/regulatory frameworks that support your work)

GI3 - What recommendations/expectations do you have, particularly for your sector?

A Study of the Music Sector in Ghana
Questionnaire for Event Organisers & Promoters

Serial No:

Interviewee's Address (Optional)	
City of Residence	
Name of interviewee	
Telephone number	

Personal Data

PD1- Which of the following are you?	
☐01	Event organiser (Entity)
☐02	Event organiser (Individual)
☐03	Promoter
☐04	Others (please specify any other music areas within which you are active)

If you are an Event organiser (Entity), please skip to PC1

PD2- Age?	
☐01	Less than 25 years
☐02	25 to 29 years old

☐03	30 to 34 years old
☐04	35 to 45 years old
☐05	Above 45

PD3 - Level of education	
☐01	Primary
☐02	Secondary
☐03	Tertiary
☐04	None
☐05	Other (please specify)

PD4 - Do you have any education/training in event organising?	
☐01	Yes
☐02	No

PD5 - If so, at what level?	
☐01	Primary
☐02	Secondary
☐03	Tertiary
☐04	Others (please specify)

PD6 - Marital status?	
☐01	Married
☐02	Single
☐03	Divorced
☐04	Widowed
☐05	Other (please specify)

PD7 - Gender	
☐01	Male
☐02	Female

PD8 - How many dependants do you have?	
☐01	1
☐02	2
☐03	3
☐04	4
☐05	5
☐06	Over 5
☐07	None

Professional Characteristics

PC1 - For how long have you been in this profession?	
☐01	Less than 1 year
☐02	1 - 5 years
☐03	5 – 15 years
☐04	15 – 20 years
☐05	Over 20 years

PC2- How many people do you employ?	
Number	

PC3- How many of your employees have music related job descriptions?	
Number	

PC3ba- How much do you pay those employees yearly?	
Average annual amount	

PC4 - What is your current status in this profession?	
☐01	Full-time
☐02	Part-time

PC5 - Where are you based?	
☐01	Ghana
☐02	Abroad
☐03	Both

PC6 - If based in Ghana, which region do you operate from?	
☐01	Greater Accra
☐02	Central
☐03	Western
☐04	Eastern
☐05	Volta
☐06	Ashanti
☐07	Brong Ahafo
☐08	Northern
☐09	Upper East
☐10	Upper West

PC7 - If operating from abroad could you indicate the reason why? (**multiple aided question**)	
☐01	Better organized music industry
☐02	Supportive regulatory environment / policies
☐03	Easy access to financial support
☐04	Access to new technology
☐05	Access to larger market
☐06	Higher return on investment
☐07	State of the art venues
☐08	Other (Please specify)

PC8 - What types of events do you organise?	
☐01	Live shows/gigs (clubs, gospel rock shows, etc)
☐02	Music competitions & musical awards
☐03	Educational Institutions/University events
☐04	Street festivals & carnivals
☐05	Beach parties
☐06	Events where music plays a minor incidental role (Funerals, fashion shows, music for theatre, bars and restaurants with live performances)
☐07	Music promotions & tours
☐08	State sponsored musical events (NAFAG, PANAFEST, etc)
☐09	Dance/cultural troupes
☐10	Discos and Spinners
☐11	Concert Parties
☐12	Others (please specify)

PC9 – How many events do you organise in Ghana in a year? Indicate according to the type of event.	
Type of event	**Number of events**
Live shows/gigs (clubs, gospel rock shows, etc)	
Music competitions & musical awards	
Educational Institutions/University events	
Street festivals & carnivals	
Beach parties	
Events where music plays a minor incidental role (Funerals, fashion shows, music for theatre, bars and restaurants with live performances)	
Music promotions & tours	
State sponsored musical events (NAFAG, PANAFEST, etc)	
Dance/cultural troupes	
Discos and Spinners	
Concert Parties	
Others (please specify)	

PC10 – How many events do you organise abroad in a year? Indicate according to the type of event.	
Type of event	**Number of events**
Live shows/gigs (clubs, gospel rock shows, etc)	
Music competitions & musical awards	
Educational Institutions/University events	
Street festivals & carnivals	
Beach parties	
Events where music plays a minor incidental role (Funerals, fashion shows, music for theatre, bars and restaurants with live performances)	
Music promotions & tours	
State sponsored musical events (NAFAG, PANAFEST, etc)	
Dance/cultural troupes	
Discos and Spinners	
Concert Parties	
Others (please specify)	

PC11 - What is the nature of your operations (**multiple aided question**)	
☐01	Working solo
☐02	Collaborating with other individual organisers/promoters
☐03	Collaborating with event organising companies
☐04	Others (please specify)

PC12 - Please indicate reason for choice above

PC13 - How long does it take to organise a single event?	
Type of event	**Number of months**
Live shows/gigs (clubs, gospel rock shows, etc)	
Music competitions & musical awards	
Educational Institutions/University events	
Street festivals & carnivals	
Beach parties	
Events where music plays a minor incidental role (Funerals, fashion shows, music for theatre, bars and restaurants with live performances)	
Music promotions & tours	

State sponsored musical events (NAFAG, PANAFEST, etc)	
Dance/cultural troupes	
Discos and Spinners	
Concert Parties	
Others (please specify)	

PC15 - How many events have you organised in your career?	
Number	

PC16 - Do you employ foreign artists to perform in your events?	
☐01	Yes
☐02	No

PC17 - What is the average blend of foreign and local artists per show?	
Category	**Percentage**
Foreign	
Local	

PC18 - Do you pay the pre-event entertainment tax when you organise shows in Ghana?	
☐01	Yes
☐02	No

PC19 - Have you won any local or international award in your career?	
☐01	Yes
☐02	No

PC20 - How many awards?	
☐01	1
☐02	2
☐03	3
☐04	4
☐05	5
☐06	More than 5

Economic Data

ED1 - How much does it cost to organise an event in Ghana?	
Type of event	**Average cost**
Live shows/gigs (clubs, gospel rock shows, etc)	
Music competitions & musical awards	
Educational Institutions/University events	
Street festivals & carnivals	
Beach parties	
Events where music plays a minor incidental role (Funerals, fashion shows, music for theatre, bars and restaurants with live performances)	
Music promotions & tours	
State sponsored musical events (NAFAG, PANAFEST, etc)	
Dance/cultural troupes	
Discos and Spinners	
Concert Parties	

Others (please specify)	

ED2 - How much does it cost to organise an event abroad?	
Type of event	**Average cost**
Live shows/gigs (clubs, gospel rock shows, etc)	
Music competitions & musical awards	
Educational Institutions/University events	
Street festivals & carnivals	
Beach parties	
Events where music plays a minor incidental role (Funerals, fashion shows, music for theatre, bars and restaurants with live performances)	
Music promotions & tours	
State sponsored musical events (NAFAG, PANAFEST, etc)	
Dance/cultural troupes	
Discos and Spinners	
Concert Parties	
Others (please specify)	

ED3 - What factors amount to the cost above?

ED4 - What is an average ticket charge per event	
Type of event	**Average charge**
Live shows/gigs (clubs, gospel rock shows, etc)	
Music competitions & musical awards	
Educational Institutions/University events	
Street festivals & carnivals	
Beach parties	
Events where music plays a minor incidental role (Funerals, fashion shows, music for theatre, bars and restaurants with live performances)	
Music promotions & tours	
State sponsored musical events (NAFAG, PANAFEST, etc)	
Dance/cultural troupes	
Discos and Spinners	
Concert Parties	
Others (please specify)	

ED5 - What is the average attendance to an event?	
Type of event	**Average number**
Live shows/gigs (clubs, gospel rock shows, etc)	
Music competitions & musical awards	
Educational Institutions/University events	
Street festivals & carnivals	
Beach parties	
Events where music plays a minor incidental role (Funerals, fashion shows, music for theatre, bars and restaurants with live performances)	
Music promotions & tours	
State sponsored musical events (NAFAG, PANAFEST, etc)	
Dance/cultural troupes	
Discos and Spinners	
Concert Parties	
Others (please specify)	

ED6 - How much do you earn per year from organising events?	
Average amount	

ED7 - Do you have other sources of income aside event organising?	
☐01	Yes
☐02	No

ED8 - If yes above how much do you earn per year aside organising music related events?	
Amount	

ED9 – Please indicate the percentage of your revenue according to the following?

Type of event	**Percentage**
Live shows/gigs (clubs, gospel rock shows, etc)	
Music competitions & musical awards	
Educational Institutions/University events	
Street festivals & carnivals	
Beach parties	
Events where music plays a minor incidental role (Funerals, fashion shows, music for theatre, bars and restaurants with live performances)	
Music promotions & tours	
State sponsored musical events (NAFAG, PANAFEST, etc)	
Dance/cultural troupes	
Discos and Spinners	
Concert Parties	
Others (please specify)	

ED10 - How do you finance your activities and can you indicate the percentage in the following category?

	Category	**Percentage**
☐01	Self-financing	
☐02	Loan from bank	
☐03	Loan from friend	
☐04	Sponsorship	
☐05	Other	

General information

GI1 - What are the major strengths of the industry? (This includes policies/regulatory frameworks that support event organisation in Ghana)

GI2 - What are the challenges in event organising in Ghana? (This includes policies/regulatory frameworks that pose a risk to event organisation in Ghana)

GI3 - What recommendations/expectations do you have for the industry?

A Study of the Music Sector in Ghana
Questionnaire for Sponsors of Music Events and Programmes

Serial No:

Interviewee's Address (Optional)	
Street name	
Name of interviewee	
Name of entity	
Telephone number	

SM1- Please tick that which applies to you?	
☐01	Individual
☐02	Corporate entity

SM2- How long have you been associated with music sponsorship in Ghana?	
☐01	Less than 1 year
☐02	1 to 5 years
☐03	6 to 10 years
☐04	11 to 15 years
☐05	Above 15 years

SM3 - Do you sponsor other events apart from music?	
☐01	Yes
☐02	No

SM4 - If Yes above, what other non-music events do you sponsor?

SM5 - Do you receive any tax incentive for sponsoring any non-music event?	
☐01	Yes
☐02	No

SM6 - What proportion of your sponsorship is to the music sector?	
☐01	Less than 10%
☐02	10% - 25%
☐03	26 – 40%
☐04	41 – 50%
☐05	Over 50%

SM7 - In what form do you provide your sponsorship? **(Multiple aided question)**	
☐01	Cash
☐02	Logistics for event
☐02	Venue
☐02	Free media coverage

☐02	Travel and tours
☐02	Other (please specify)

SM8- What is your funding source?	
☐01	Personal
☐02	Ghana Government
☐03	Foreign government/Diplomatic mission
☐04	Donor funding
☐05	Other (please specify)

SM9 - Over how many years have you sponsored music?	
☐01	Less than 1 year
☐02	1 – 5 years
☐03	6 – 10 years
☐04	10 – 20 years
☐05	Over 20 years

SM10 - How much do you spend in a year on music sponsorship?	
Amount	

SM11- Which of the following activities do you sponsor? **(Multiple aided question)**	
☐01	TV and radio shows
☐02	Street carnivals
☐04	Traditional African festivals
☐05	Modern festivals
☐06	National music events
☐07	International music events taking place in Ghana
☐08	International music events, tours and exchange visits abroad
☐09	Private schools, archives and NGOs
☐10	Music events at hotels, night clubs and dance spots
☐11	Other (please specify)

SM12 - Indicate the percentage of your sponsorship based on the following?	
TV shows	
Street carnivals	
Festivals	
National music events	
International events	
Other (please specify)	

SM13 - Which of the genres do you prefer to sponsor?	
Hip-life	
Classic highlife (Old time)	
Contemporary highlife (Modern)	
Choral	
Art music	
Gospel	
Traditional/folkloric	
Reggae	
Jazz	
Film/Video music	

Afro Beat/Afro Rock/Afro Jazz	
Brass Band	
Western	
Other (Please specify)	

SM14 - Do you receive any incentive from government for sponsoring music?	
☐01	Yes
☐02	No

SM15 - If yes above, what form of incentive?

SM16 - Do you have any conditions attached to your sponsorship? Please explain

SM17 - What is do you see about the Ghanaian music sector and its potential?

SM18 - What policy changes do you recommend to enhance music sponsorship?

A Study of the Music Sector in Ghana
Questionnaire for Content Providers

Serial No:

Interviewee's Address (Optional)	
Region of Residence	
Street name	
Name of Company	
Telephone number	

Membership

M1- Which of the following WASPAG memberships do you belong to?	
☐01	Ordinary member
☐02	Associate member

M2- For how long have you been in operation as a Content Provider?	
Number of years	

Data

D1 - Which of the following MNOs do you work with?	
☐01	Vodafone
☐02	MTN
☐03	Tigo
☐04	Airtel
☐05	Expresso
☐06	Glo

D2 - How much is a caller charged per download?	
Amount (GHC)	

D3 - What is the average percentage split of the charge between you and the MNO?		
MNO	**Percentage for the MNO**	**Your percentage**
Vodafone		
MTN		
Tigo		
Airtel		
Expresso		
Glo		

D4 - What is the average percentage split of the charge between you and the artiste?	
Your percentage	**Artiste's percentage**

D5 - What is the average number of downloads per month?			
	Pessimistic (when business is low)	**Most-likely (on a normal day)**	**Optimistic (when business is booming)**
Number of downloads per month			

D6 - What is the average number of uploads per month?			
	Pessimistic (when business is low)	**Most-likely (on a normal day)**	**Optimistic (when business is booming)**
Number of uploads per month			

D7 - Do you pay royalties to the Ghana Music Right Organization (GHAMRO)?	
☐01	Yes
☐02	No

D8 - Which of the genres below do you use as content for the RBT? (please tick as many as apply)	
☐01	Hip-life
☐02	Classic highlife (Old time)
☐03	Contemporary highlife (Modern)
☐04	Choral
☐05	Art music
☐06	Gospel
☐07	Traditional/folkloric
☐08	Reggae
☐09	Jazz

☐10	Film/Video music
☐11	Afro Beat/Afro Rock/Afro Jazz
☐12	Brass Band
☐13	Western
☐14	Foreign music
☐15	Other (Please specify)

General information

GI1 - What are the major strengths of the industry?

GI2 - What are the key challenges?

GI3 - What recommendations do you have for the industry?

17.3 Appendix C – Names of some sensational Ghanaian music professionals, music archives and the impact of colonialism

Some sensational Ghanaian music professionals have been identified and grouped according to the genres within which they were/have been prominent.

AFRICAN ART MUSIC: Reverend Allotey Pappoe, Ephraim Amu, Prof J.H.K. Nketia, Phillip Gbeho, Kenn Kafui, Nana Danso Abiam, Otto Boating, Gyima Larbi, Atta Annan Mensah, N.Z. Nayo, etc

DANCE BAND: E.T. Mensah, Spike Anyankor, Jerry Hansen, King Bruce, Tommy Grippman, Stan Plange, C.K. Mann, Jewel Ackah, Papa Yankson, AB Crentsil, Blay Ambolley, Smart Nkansah, Eddie Quansah, George Lee, Ebo Taylor, Sammy Odo, Pat Thomas, Joe Eyison, Ray Ellis, Eric Agyeman, Nana Tuffour, Ray Allen, Dan Tackey, Nat Buckle, ChsterAdams, Prince Ali, Tommy Darling, etc

GUITAR AND CONCERT PARTY BANDS: Kwame Asare, Kwaa Mensah, E.K. Nyame, Kakaiku, Yamoah, Nana Ampadu, Koo Nimo, T.O. Jazz, Jackson A. Apofo, K. Frempong, Kofi Ani Johnson, AK Yeboah , Akwesi Ampofo Adjei, F. Micah, YB Bampoe, Paa Bobo, Bob Cole, Bob Ansah, Kofi Sammy, Eddie Donkor, Kobina Okai ,S.K. Oppong, K.K. Kabobo, Dr. Gyasi, K. Onyina, Amakye Dede, Anthony Scorpion, etc

REGGAE: Kojo Antwi, Rocky Dawuni, Felix Bell, Shasha Marley, Sheriff Ghale, Black Prophet, Ekow Savage, etc

AFRO-JAZZ, AFRO-ROCK, AFROBEATS: Kofi Ghanaba, Mac Tontoh, Teddy Osei and Sol Amarfio of Osibisa, Smart Arpah , Lord Lindon, Lash Laryea, Stanley and Frank Todd, Okyerema Asante, Alfred Kari Bannerman, Kojo Essah, Kwese Asare , Cliff Eck, Jimmy Beckley, Noi Noi Nortey, Captain Yaba, Kojo Gavua, Kwesi Dankwah, etc

BURGER HIGHLIFE: Daddy Lumba, George Darko, Charles Amoah, John K, Sloopy Mike Gyamfi, Albert Jones , McGod, Lee Dodou, Bob Fiscian, Nana Acheampong, Nana Asamoah, Nana Aboagye da Costa, Khodjo Aquai, etc

HIPLIFE: Reggie Rockstone, Sarkodie, Terry Bonchaka, Slim Buster, Nana Quame, Nana King, Lord Kenya, Sidney, Obrafour, Obour, Kwaaw Kesse, Omanhene Pozo, Adane Best, Okyeame Kwame, Samini, Tic Tac, VIP, Wanluv the Kubolor, Daasebre, R2bees, Oheneba Kissi, Aberewa Nana, Chicago, Ex Ddoe, Buk Bak, King Ayisoba, Kwadee, Edem, Stay Jay, 4x4, Ruff N Smooth, and Efya etc

FOLKLORIC: Mustapha Tettey Addy, Bernard Womah, King Ayisoba, Atongo Zimba, Nii Ashitey, Osei Korankye, Dela Botri, Kakraba Lobi, Godwin Agbele, Dr. Kwese Aduonum, Aaron Bebe Sukura, Nii Tetteh, Nii Adu 'Bigboy' Ofoliquaye, Boating Kodua Acheampong, Johnson Kemeh , Nii Amah Akomfra, Steven Kontor, Richard Danquah, Salisu Goje, Richard Danquah, Kyerematen Baffour, Daniel 'J.B' Koranteng Crentsil, etc

CONTEMPORARY HIGHLIFE: Amanzeba, Rex Omar, KK Fosu, Ofori Amponsah , Ben Brako, Bessa Simon, Wuta, Kwamena Kwamena, Kwame Yeboah, Paulina Oduro, Lucky Mensah, K.K. Kabobo, Desmond Ababio, Edmund Mensah, Afromoses, Obiba Sly Collins, Ackah Blay, Abebe Kakraba, Dan Tackie, etc

GOSPEL: Tagoe Sisters, Daughters of Glorious Jesus, Suzzy and Matt, Cindy Thompson, Ola Williams, Diana Hopeson, Kofi Abraham, Stella Dugan, Michael Bonsu, Jonathon Javes Reeves, Mary Ghansah, Reverend Yaw Agyeman Baidoo, Helena Rhabbles, Yaw Sarpong, Joe Beecham, Hannah Marfio, Carlos Sekyi, Juliet Antwi , Amy Newman, Kwesi Abaka, Elder Collins Amponsah, Jane and Bernice, etc

OTHERS: Julie Okine, Agnes Aryitey, Christy Azuma, Charlotte Dada, Lola Everett, Asabea, Della Hayes, Awura Ama, Rama and Bibie Brew, Joanna Okang, Efua Dokonu, Naa Amanua, Akosua Agyepong ,MzBel,Efya, Becca, Sherifatu Gunu, Lady Talata , etc

PRIVATE/NGO MUSIC ARCHIVES IN GHANA

Name	Founding Individual	Setup	Location
African Cultural Research Centre	Kwesi Asare	1995	Larteh
African Heritage Library	Kofi Ghanaba	1980s	Medie
BAPMAF Music Archives & Highlife Institute	John Collins	1990	Accra
Gramophone Museum	Kwame Sarpong	Late 1990s	Cape Coast
International Centre for African Music and Dance	Professor Nketia	Mid 1990s	University of Ghana, Legon

IMPACT OF COLONIALISM

Colonialists used music for their own ends and so introduced brass bands music for the regimental bands of the British and African soldiers, mission music to spread Christianity and western notation, scales and harmonies as part of formal education. The positive effects were that this introduced new musical ideas, genres, techniques and instruments to Ghanaian. The negative impact was that this Eurocentric attitude to music downplayed traditional music and even suppressed some forms, whilst elevating the status of western music. All this reinforced the 'colonial mentality' amongst Ghanaians in terms of the use of the English language for song lyrics and instilling amongst many Ghanaians a preference to things foreign rather than local. This musical colonialization or imperialism only began to change with the rise of nationalist sentiments. This was first expressed in the choral music of Ephraim Amu and others who, in the early 1900s, developed an idiom of vernacular hymns, anthems and chorals. This was followed in the1950s by the "African Personality" policy of Nkrumah that encouraged the Africanisation of art music at university institutions, the folklorisation of traditional African music and dance at schools of performing arts, the teaching of local music in schools – as well as the fostering of Ghanaian highlife to project a national identity. At the same time the foundation of a Ghanaian music industry was begun through the Africanisation of the content of the broadcasting and film sector, encouraging the establishment of private local music labels, night-clubs and record pressing plants, the formation of and the Arts Council and Kumasi Cultural Centre, operating national and local music festivals, and the fostering of music unions.

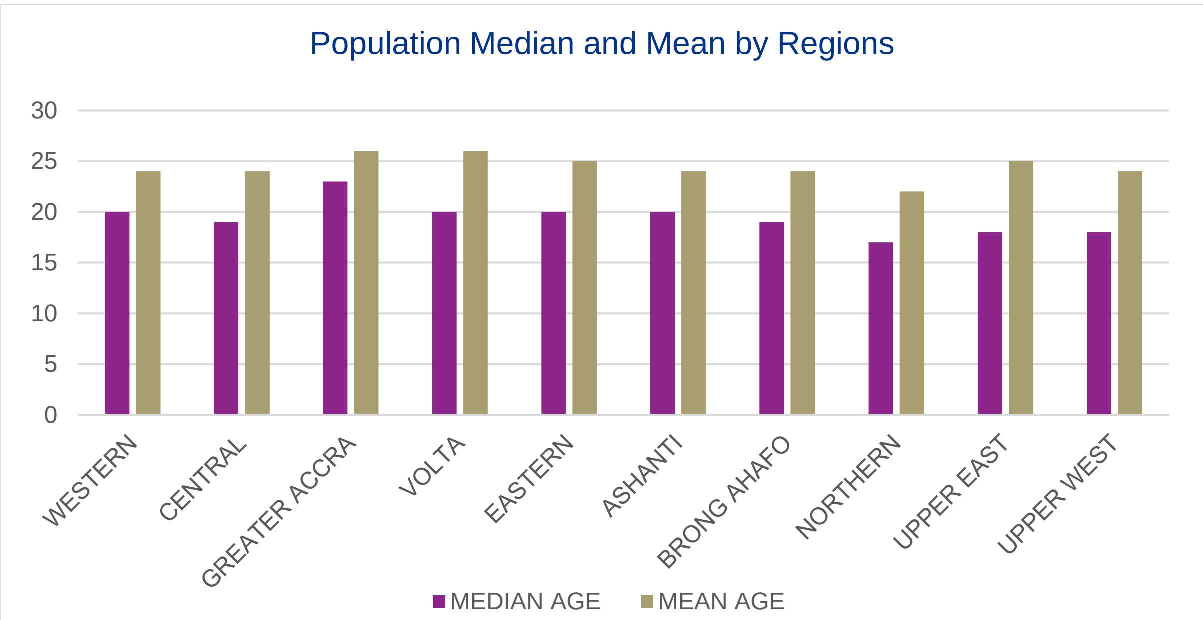
17.4 Appendix D – Ghanaian population according to age groups and regions

Population by age group and region (1/2)												
		All regions	Western		Central		Greater Accra		Volta		Eastern	
Age Group	Percent	Number	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total	100.0	24,658,823	2,376,021	100.0	2,201,863	100.0	4,010,054	100.0	2,118,252	100.0	2,633,154	100.0
Less than 1	3.0	731,201	70,694	3.0	70,850	3.2	113,077	2.8	65,411	3.1	76,809	2.9
1 to 4	10.8	2,674,205	262,682	11.1	242,608	11.0	356,774	8.9	232,051	11.0	282,155	10.7
5 to 9	12.7	3,128,952	306,005	12.9	282,827	12.8	397,499	9.9	266,026	12.6	328,526	12.5
10 to 14	11.8	2,916,040	287,133	12.1	275,549	12.5	386,282	9.6	249,337	11.8	323,564	12.3
15 to 19	10.6	2,609,989	251,304	10.6	244,020	11.1	388,403	9.7	222,553	10.5	279,234	10.6
20 to 24	9.4	2,323,491	229,255	9.6	195,729	8.9	458,075	11.4	179,449	8.5	221,624	8.4
25 to 29	8.3	2,050,111	200,276	8.4	162,630	7.4	443,383	11.1	152,521	7.2	193,386	7.3
30 to 34	6.8	1,678,809	160,964	6.8	132,339	6.0	357,070	8.9	128,752	6.1	160,582	6.1
35 to 39	5.8	1,421,403	142,132	6.0	118,873	5.4	282,420	7.0	113,090	5.3	146,892	5.6
40 to 44	4.8	1,186,350	116,622	4.9	100,753	4.6	220,520	5.5	101,280	4.8	129,241	4.9
45 to 49	3.8	938,098	91,973	3.9	83,934	3.8	165,522	4.1	87,382	4.1	111,096	4.2
50 to 54	3.4	833,098	78,627	3.3	78,775	3.6	136,577	3.4	80,340	3.8	102,535	3.9
55 to 59	2.1	523,695	47,899	2.0	50,729	2.3	91,902	2.3	52,416	2.5	67,498	2.6
60 to 64	1.9	475,849	40,538	1.7	45,878	2.1	70,440	1.8	50,287	2.4	59,224	2.2
65 to 69	1.2	293,871	24,682	1.0	30,245	1.4	45,004	1.1	32,362	1.5	37,379	1.4
70 to 74	1.4	351,330	27,179	1.1	33,817	1.5	38,855	1.0	41,164	1.9	45,712	1.7
75 to 79	0.8	205,953	14,643	0.6	19,085	0.9	23,485	0.6	25,618	1.2	27,248	1.0
80 to 84	0.6	159,084	11,394	0.5	16,096	0.7	17,117	0.4	19,531	0.9	20,079	0.8
85 to 89	0.3	83,070	6,384	0.3	8,812	0.4	10,198	0.3	10,000	0.5	10,660	0.4
90 to 94	0.2	51,081	3,794	0.2	5,611	0.3	4,919	0.1	6,071	0.3	6,708	0.3
95 +		23,143	1,841	0.1	2,703	0.1	2,532	0.1	2,611	0.1	3,002	0.1
Median age		20	20		19		23		20		20	
Mean age		24	24		24		26		26		25	
Dependent Population												
(less than 15 & 65	43.1	10,617,930	1,016,431		988,203		1,395,742		950,182		1,161,842	
Population (15+)	61.7	15,208,425	1,449,507		1,330,029		2,756,422		1,305,427		1,622,100	
Population (18+)	55.3	13,632,299	1,298,515		1,180,896		2,530,344		1,170,624		1,451,228	

Source: GSS, 2010 population and housing census & KPMG Analysis

Population by age group and region (2/2)												
		All regions	Ashanti		Brong Ahafo		Northern		Upper East		Upper West	
Age Group	Percent	Number	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total	100.0	24,658,823	4,780,380	100.0	2,310,983	100.0	2,479,461	100.0	1,046,545	100.0	702,110	100.0
Less than 1	3.0	731,201	145,092	3.0	71,326	3.1	68,759	2.8	29,922	2.9	19,261	2.7
1 to 4	10.8	2,674,205	493,372	10.3	256,225	11.1	354,265	14.3	115,391	11.0	78,682	11.2
5 to 9	12.7	3,128,952	588,287	12.3	311,104	13.5	393,594	15.9	152,242	14.5	102,842	14.6
10 to 14	11.8	2,916,040	577,167	12.1	294,036	12.7	293,995	11.9	137,064	13.1	91,913	13.1
15 to 19	10.6	2,609,989	514,803	10.8	253,449	11.0	261,935	10.6	115,952	11.1	78,336	11.2
20 to 24	9.4	2,323,491	473,522	9.9	213,694	9.2	210,682	8.5	82,512	7.9	58,949	8.4
25 to 29	8.3	2,050,111	413,165	8.6	182,328	7.9	187,414	7.6	67,824	6.5	47,184	6.7
30 to 34	6.8	1,678,809	335,754	7.0	148,370	6.4	155,581	6.3	57,984	5.5	41,413	5.9
35 to 39	5.8	1,421,403	284,107	5.9	127,466	5.5	120,728	4.9	51,323	4.9	34,372	4.9
40 to 44	4.8	1,186,350	231,454	4.8	106,337	4.6	104,120	4.2	45,514	4.3	30,509	4.3
45 to 49	3.8	938,098	179,600	3.8	83,886	3.6	73,348	3.0	37,717	3.6	23,640	3.4
50 to 54	3.4	833,098	157,382	3.3	74,238	3.2	67,123	2.7	35,251	3.4	22,250	3.2
55 to 59	2.1	523,695	99,984	2.1	45,501	2.0	33,004	1.3	21,210	2.0	13,552	1.9
60 to 64	1.9	475,849	82,230	1.7	39,205	1.7	46,129	1.9	25,058	2.4	16,860	2.4
65 to 69	1.2	293,871	51,432	1.1	23,171	1.0	23,974	1.0	16,020	1.5	9,602	1.4
70 to 74	1.4	351,330	63,693	1.3	32,021	1.4	33,896	1.4	22,694	2.2	12,299	1.8
75 to 79	0.8	205,953	35,155	0.7	20,213	0.9	17,356	0.7	14,509	1.4	8,641	1.2
80 to 84	0.6	159,084	26,056	0.5	14,681	0.6	17,916	0.7	9,563	0.9	6,651	0.9
85 to 89	0.3	83,070	14,515	0.3	6,842	0.3	8,224	0.3	4,673	0.4	2,762	0.4
90 to 94	0.2	51,081	9,388	0.2	4,731	0.2	5,266	0.2	2,926	0.3	1,667	0.2
95 +		23,143	4,222	0.1	2,159	0.1	2,152	0.1	1,196	0.1	725	0.1
Median age		20	20		19		17		18		18	
Mean age		24	24		24		22		25		24	
Dependent Population												
(less than 15 & 65+)	43.1	10,617,930	2,008,379		1,036,509		1,219,397		506,200		335,045	
Population (15+)	61.7	15,208,425	2,976,462		1,378,292		1,368,848		611,926		409,412	
Population (18+)	55.3	13,632,299	2,664,330		1,223,774		1,211,127		540,452		361,009	

Source: GSS, 2010 population and housing census & KPMG Analysis



Source: GSS, 2010 population and housing census & KPMG Analysis

17.5 Appendix E - Categories and sub-categories of the Music Industry

Category	Sub-category
Bands	1. Traditional/Folkloric Groups 2. Church/Gospel Bands 3. Dance bands 4. Brass bands
Musicians (including contemporary/popular)	1. Lyricists 2. Composers 3. Arrangers 4. Performers/Singers 5. Instrumentalists 6. Dancers/Choreographers 7. DJs (Club and Spot)
Music instrument manufacturers and repairers	1. Traditional/indigenous manufacturers and repairers 2. Western instrument repairers
Venue Owners/Operators	1. Night clubs 2. Beach resorts 3. Drumming/Music/Dance Schools 4. Cultural Centres 5. Foreign embassies and their cultural locations 6. Parks, Gardens, Open-air, Trade fair sites, Amusement parks 7. Hotels/Restaurants 8. School and university venues and grounds 9. Street events/Carnivals 10. Sports Stadiums
Spinners	1. Full time 2. Part-time
Media and Telecom Companies	1. Radio Stations 2. Television Stations 3. Telecom Company 4. Print media
Distributors	1. CD and/or Cassette Distributors 2. Music product retailers (Cassette and CD Sellers) 3. Digital Download Companies (Content Providers)
Consumers (in Ghana)	1. Resident Ghanaians 2. Non-resident Ghanaians on a business trip 3. Foreign nationals residing in Ghana 4. Foreign nationals on a business trip
Tourists	1. Non-resident Ghanaians on tour 2. Foreign nationals on tour
Executive Producers	1. Record labels 2. Publishers 3. Executive Producers
Choral Groups	1. Church choirs 2. Youth choirs 3. Corporate choirs

Category	Sub-category
Public Bands (also includes dance bands)	1. Army 2. Navy 3. Air Force 4. Police bands 5. Prisons service bands
Artiste Managers	1. Formal establishment 2. Individual
Sponsors	1. Corporate entity 2. Individual
Educational Institutions	1. Public institution 2. Private institution
Studio Managers/Operators	1. Sound Engineer 2. Music Video Creator/Producer 3. Film maker/producer (feature films and documentaries) 4. Studio Manager/Operator
Manufacturers	1. CD Manufacturers 2. Cassette Manufacturers
Event Organisers	1. Event organiser (Formal establishment) 2. Promoter (Individual)
Other sectors that generate income as a result of musical activities	1. Clothing/fashion designers 2. CD/DVD label and jacket designers 3. Food vendors 4. Transport operators etc 5. Photographers 6. Stage designers/decorators 7. Rentals for instruments, cars, etc

List of Institutions and Key Personalities that were interviewed

No.	Institution
1.	Organisations, Associations and Institutions
2.	Copyright Office
3.	Ghana Association of Phonographic Industries (GAPI)
4.	Ghana Music Rights Organization (GHAMRO)
5.	Musicians Union of Ghana
6.	Association of Music Rights Owners
7.	Ministry of Tourism, Culture and Creative Arts
8.	Ministry of Chieftaincy and Traditional Affairs
9.	Ministry of Trade and Industry
10.	Greater Accra Spinners Association
11.	Ministry of Justice and Attorney General's Department
12.	Ministry of Finance
13.	Ministry of Foreign Affairs
14.	National Commission on Culture

No.	Institution
15.	Centre for National Culture
16.	National Theatre
17.	Accra International Conference Centre
18.	Alliance Francaise
19.	Goethe Institute
20.	British Council

	Key personalities
1.	Prof. John Collins (Music Department, University of Ghana)
2.	Mr. Carlos Sakyi (in his personal capacity not as Chairman of the Board of GHAMRO)
3.	Mr. Daniel Adjei (Representative of Veteran Musicians Association of Ghana on GHAMRO)
4.	Dr. Joshua Amuah (Music Department, University of Ghana)
5.	Azonko Simpi (Classic Africa Orchestra)
6.	Daniel Amponsah (Agya Koo Nimo)
7.	Colonel Sampson Paa-Kwesi Ebonyi (Director of Music of the Ghana Armed Forces Central Band) Assistant Supperintendant Frank Hupkorti (Head of Police Bands) Titus Arko (Fire Service Bands) Evans Kofi Amo (Deputy Seperintendant of Immigration)

List of other key personalities that were interviewed

GHANA FOLKLORIC MUSIC: Dela Botri Hewale Sounds// Aaron Bebe Sukura//Daniel 'J.B'. Koranteng Crentsil// Johnson Kemeh's Brotherhood Foundation Cultural Group// Jerry James (Nii Latekwei)// Mustapha Tettey Addy, master drummer // Okyeame Kwame seprewa player & teacher.

PUBLIC BANDS: Superintendant of Immigration Evans Kofi Amo//Titus Arko Fire Service// Colonel Ebonyi, Dir of Music Armed Forces Central Band//Frank Hupkorti ex head of the Police Band.

COPYRIGHT/ ANTI PIRACY: Mr. Alfred Kuni-Atiemo Copyright Office//Mr. Mayo Ayilaran CEO of the musical copyright society of Nigeria//Dr. Tee Mac Omatshola Iseli past president of the Performing Musicians Union of Nigeria PMAN// Carlos Sakyi GHASCAM //Andrew Amegatcher copyright lawyer // Camilla Andersen: Danish - Ghana copyright research and new copyright bill.

POP & HIGHLIFE MUSICIANS: Aka Blay//Peter Marfo of Ramblers// Kofi Kudjonu and Mark Millers of Big Shots band// Della Hayes of Dzezi band// Sheriff Ghale Tamale based musician and studio engineer// Brew Bibi singer and runs New Morning Club Tesano// Koo Nimo guitarist and Adadan Cultural Resource Centre Kumasi//Jigga Morfy // Kwame Yeboah // Simons Bessa// Ben Brako.

MUSIC RECORDING ENGINEERS PROMOTERS: Francis Kwakye Rhythmist Studio// Charles Amoah recording studio//Paa K Holdbrook-Smith music promoter//Zap Mallet recording studio//Panji Anoff Pidgin Studio

GHANA UNIVERSITIES: Dr. Joshua Amuah (choral music) and Hilarious Woako (brass bands) both of the Music Dept Legon //Amos Anyimadu Political Science// Nii Yartey and Francis Terry Bright Ofosu of the Legon Dance Dept //Awo Asiedu, Afrikanus Aveh and Francis Gbormittah of Legon Theatre Arts Dept// Alexander Agordah gospel expert at the legon Institute of African

Studies// Adwo Arhine on traditional Fanti females music// Gavin Webb working on Ghanaian neo-traditional music// Michael Ohene-Okantah Winneba University music education //Prof Mireku and Dr Kongo Zabana of Cape Coast University music education // Dr Joseph Frempong of Ashesi University music and film department.

UNIVERSITY STUDENTS Juan Gomez work on Ghanaian Afrofunk//Benjamin Oduro Arhin on Ghanaian music and neo-liberalism// Abena Kyire on female pop musicians//Grace Donkor on the Tagoe Sisters// Eric Fiagbadzi on Naa Amanua and Ga cult Music// Eric Sunu on burger highlife// Ariel Melinger-Cohenon on the Tamale music scene //Emmnanuel Gyima Aboagye and Adjei Moses Adjetey on Ghanaian music education reforms

ABROAD [MAINLY FOR INFO ON WORLD MUSIC SALES/FESTIVALS]: Alfred Bannerman UK //Dotsi Mike Dovi UK // Charles Easmon of UK Afro-Caribbean Music Circuit) //Johnny Opoku-Acheampong //Afro Moses//Pederson Morten Mygent Ghana music industry research// Mads Oustrup DIGIDI Scandinavian webmusic//Will Page UK PRS//Robert Urbabnus UK Sterns African Records// Martin van Aalst and Rob Berings Hippo Records Holland //Scott Rollins Otrabands Records Holland //Stan Rijven Dutch music journalist// Mark Levine, Banning Eyre and Sean Barlow of US Public Radio Afropop program//
Gerald Selgman music producer UK//Kris Bediako UK //Christiaan De Beukelaer Communications Studies University of Leeds// Rob Lokin organsier of Dutch Hertm Afro Festival//Jesse Shipley hiplife book // Rita Ray BBC // Julian Hynes Toronto Afrofest //Simon Broughton editor of UK songlines// Samy Redjeb Frankfurt Analog Africa Records// Quintin Scott Strut Records UK

OTHERS IN GHANA
Dela Fumador, Adadome Tourist Agency
Ebo Hawkson, cultural advocate
Kofi Tsikita, World Bank
Yahaya Alpha Suberu, Cinecon Films
FiiFi Kahn Agyakwah, MUSIGA
Francis Mensah Twum GAPI
Godwin Yirenkyi, journalist
Azonko Simpi, film music and neo traditional ensemble
Esi Sutherland Addy, Mmofra Foundation
Kofi Setordji, Nubuke Foundation East Legon
Stephaie Soleansky, Institut Francais Ghana
Akunu Dake, Ghana Cultural Forum
Adjei Moses Adjetey GBC Gramophone Library
Professor Linus Abraham, Director of NAFTI
Professor JHK Nketia and Andrews Agyemfra-Tettey of the International Centre for African Music & Dance ICAMD

LIST OF RADIO STATIONS IN THE TEN REGIONS AND THE ASSIGNED FREQUENCIES

RADIO STATIONS	
Greater Accra Region	**Assigned Frequency (MHz)**
Mascott Multiservices Limited (Atlantis Radio)	87.9
Sky Broadcasting Company Ltd. (Sunny FM)	88.7
Primetime Media Investment Limited (Prime FM)	89.1
Alliance Francaise International (Radio France International (Rfi))	89.5
Network Broadcasting Limited (Radio Gold)	90.4
Lite FM Station Limited (Great FM)	91.3
Quest Fine Limited. (Vibe FM)	91.9
Victory Broadcasting (Channel R)	92.7
Xyz Broadcasting Limited (Radio Xyz)	93.1
Hitz FM	92.9
Pravda Radio Ltd (Formerly Consumer Advocacy Centre)	93.5

Ghana Community Broadcasting Services (Radio Ada)	93.7
F. P. Communications Limited (Hot FM)	93.9
Sweet Melodies FM Ltd	94.3
Bell Communications Limited (Asempa FM)	94.7
Aewaha Company Ltd. (X FM)	95.1
Ghana Broadcasting Corporation (Uniiq FM)	95.7
Ghana Broadcasting Corporation (Obonu FM)	96.5
RADIO STATIONS continued	
West Africa Goldfields Ltd (Citi FM)	97.3
Valley View University	97.7
Voice Of America Service (Voa)	98.1
Global Media Alliance (Happy FM)	98.9
Marhaba Multimedia Limited	99.3
Multimedia Broadcasting Co. Ltd. (Joy FM)	99.7
Gender Awareness Foundation (Meridian FM)	100.5
British Broadcasting Corporation (Bbc Radio)	100.5
Paradise Vision Estates Ltd. (Okay FM)	101.7
Sunshine Radio Limited. (Choice FM)	102.3
Top – Sounds Limited (Top Radio)	103.1
Pearl Communications Ltd. (Radio Hit)	103.7
Despite Music Production Ltd. (Peace FM)	104.3
Sena Radio Limited (Sena Radio)	104.7
Culture In The Neighbourhood (Radio Daestrifa)	105.1
University Of Ghana. (Radio Universe)	105.7
Aero Communications Ltd. (Adom FM)	106.3
Oman FM Limited (Oman FM)	107.1
K & N Investments Ltd. (Y-FM)	107.9
Amanie Community Radio Station	88.3
Latenu Development Association (La-Community Radio FM)	102.7
Ad-Libs Multimedia Co. Ltd.	90.9
Dear Mama Joint Limited	89.9
Manye Investment Limited (Manye-FM Radio)	105.1
Omega 3 Communication Limited.	87.5
A2z Limited	107.5
Access World	103.5
Eastern Region	
Koforidua Polytechnic Star Of The East	87.7
Media Mall Comp. Ltd. (Hill Top FM)	88.3
Mcperry Multimedia Ltd. (Crush FM)	89.1
FMsl Multi Media (Rite FM)	90.1
Obuoba FM Limited (Obuoba FM)	91.7
Theovision International (Nkonim FM)	93.5
Rural Ghanastratford On-Avon Trust Foundation (Radio Mountains)	96.1
Emak Multimedia Ltd (Emak 97.7)	97.7
Oxzy Promotion (Heart FM)	98.5
Nafak Co. Ltd. (Life FM)	98.7
Events & Projects International Limited (Hi FM)	99.3
Birim Youth For Action. (Radio Biyac)	101.9
Ghana Broadcasting Corporation. (Sunrise FM Relay)	102.1
Future FM Limited (Future FM)	102.7
Eastern FM Company (Eastern FM)	105.1
Goodlife Boradcasting Company Limited (Goodlife FM)	105.5

Fawe Ghana Chapter (Fawe FM)	105.9
G. B. C. (Sunrise FM)	106.7
RADIO STATIONS continued	
Radio Afram Plains (RAP FM)	107.7
Brong Ahafo Region	
Global Media Partners Ltd (Space FM)	87.7
Chris Electronic Ltd (Chris FM)	88.9
Star Business And Ent. Limited (Star FM)	89.7
Vizen FM Ltd. (Vizen FM)	90.5
Success Communications Ltd. (Success FM)	90.9
Frank Media (Dinpa FM)	91.3
Fzc Limited (Formerly Fredzab Broadcasting Co. Ltd) (Classic FM)	91.9
Angel Broadcasting Services (Nananom FM)	92.5
Smile FM Ltd.	93.1
Ghana Broadcasting Corporation (Radio Bar)	93.5
In The Name Of Jesus Co. Ltd. (Omega FM)	94.9
Ghana Broadcasting Corporation. (Radio Bar Relay)	95.3
Promised Touch Company Ltd.	95.5
Yankee FM Co.Ltd. (Yankee FM)	95.9
Sky Broadcasting. (Sky FM)	96.7
Matello's Company Limited (Kiss FM)	97.5
Anchor FM Ltd.	99.1
Jerryson FM Ltd.	99.9
Agyapasei Network Ltd (Shalom Radio)	100.3
Katakyie And Katakyie Limited (Ark FM Radio)	107.1
Royal FM.	101.5
Storm Radio	101.9
Center Point Radio (Duapa FM)	102.7
Asta FM Ltd. (Asta FM)	103.9
Atumpan Communications Ltd. (Gift FM)	105.5
Grace FM Limited (Grace FM)	106.3
Adepa FM	107.3
Adars Electronic Ltd (Adars FM)	107.7
Ashanti Region	
Freedom FM Ltd. (Ahenema Radio)	87.9
Starcom Broadcasting Limited (Spirit FM)	88.3
Zuria FM Ltd. (Zuria FM)	88.7
Nana Akosua Oforiwaa & Company Ltd (Radio First Dove FM)	89.5
Ghana Broadcasting Corporation (Garden City Radio)	89.9
Mighty Radio Ltd. (Mighty Radio)	91.1
New Mercury Broadcasting Ltd. (New Mercury FM)	91.5
Alliance Francaise D'kumasi (Rfi)	92.9
Kessben FM Limited (Kess FM)	93.3
Boss FM	93.7
Sekyere FM	94.1
Kwame Nkrumah University Of Science And Technology (Radio Focus)	94.3
Wamyark Company Limited (All Friends Radio)	94.5
RADIO STATIONS continued	
Light FM Ltd (Light FM)	94.9

Nkosuo Radio Ltd. (Nkosuo FM)	95.3
Angel Broadcasting Services (Angel FM)	96.1
Imperial Broadcasting Company Ltd.	97.1
F-Gaint Limited. (Fox FM)	97.9
Adansi Communications Network Ltd. (Shaft FM)	98.1
Multimedia Broadcasting Company. (Luv FM)	99.5
Dulcet Broadcasting Limited (Kings FM)	100.3
Combine House of Music (Ashh FM)	101.1
Mediacast Ltd.	102.5
Neat FM Company Ltd. (Hello FM)	101.5
Otec Limited. (Otec FM)	102.9
Hilltop Broadcasting Industry Ltd. (Asempa Radio)	103.1
Jakwapo Express Limited (Solid FM)	103.7
Nhyira Media Limited (Nhyira FM)	104.5
University College Of Education, Kumasi Campus	105.1
Kwame Yeboah Frimpong Ltd. (Faith FM)	105.3
Jem Boat Communications Ltd (Jem FM)	105.7
E. I. B. Network (Gh) Limited (Ultimate FM)	106.9
Positive Network Ltd	96.9
Mediterranean Projects Limited	99.1
Price Media Company Limited.	107.3
Amansie Communications Ltd.	90.3
Boacha Unity FM Ltd.	106.5
Western Region	
Sametro Co. Ltd. (Space FM)	87.7
Ghana Broadcasting Corporation (Twin City Radio Relay)	88.1
Tarkwa KNUST School of Mines (Dynamite FM)	88.9
Western Salam Comm. & Business Centre (Kyzz FM)	89.7
Wassa-Aowin Enterprises Limited (Best FM)	90.5
Melody Broadcasting Company Limited (Melody FM)	91.1
Flavour And Base Ltd. (Formerly Bluewave) (Spice FM)	91.9
Sunrise Network Ltd. (Liberty FM)	92.7
Wilsad Support Promotions Services (Skyy Power)	93.5
Ghana Broadcasting Corporation (Twin City FM)	94.7
Ghana Broadcasting Corporation (Twin City FM Relay)	94.9
Ghana Broadcasting Corporation (Twin City Radio Relay)	95.1
Pure Group Ltd (Pure FM)	95.3
Universal Media Ltd (De Beat FM)	95.5
Goodnews FM Ghana Ltimited (Goodnews FM)	96.3
RADIO STATIONS continued	
Mediacast Ltd. (Y97.9FM)	97.9
Black ''M" Company Ltd. (Rok FM)	98.7
Trickie FM Radio Station (Trickie FM)	99.5
Paragon Investments (Gh) Ltd.	99.9
Atwima Multi Comm. Ltd.	100.3
Ankobra Medialink Co. Ltd. (Ankobra FM)	101.9
Supermax Media Company Ltd. (Max FM)	102.7
Owasacoma Ventures (Vision Radio)	102.7
Help FM. Gh. Ltd. (Help FM)	103.9
B.B.C. World Services	104.7
Okyere-Minta Company Ltd. (Radio Maxx)	105.1

Gray Express Services Ltd. (Beach FM)	105.5
Trust Media Limited (Aseda FM)	105.9
Radio Rainbow Ltd. (Radio Rainbow)	107.7
Kasapreko FM	90.5
Esemaman Development Association (Radio Shama)	92.9
1962 Media Investment Ltd	104.9
Golden Pod Limited	105.5
Central Region	
Cape Coast Polytechnic (Eagle FM)	87.7
Theovision International (Aseda FM)	88.1
Community Rural Independent Station (Radio Peace)	88.9
Golden Star FM Broadcasting Co.Ltd	89.3
Mediacast Ltd. (Sompa FM)	90.9
Ghana Broadcasting Corporation (Radio Central Relay)	91.3
Solar FMCompany Limited (Solar FM)	91.3
Obrempon FM Ltd. (Obrempon FM)	91.7
Ghana Broadcasting Corporation (Radio Central)	92.5
Pink Panther Enterprise Limited	96.9
Kantinka FM Ltd (Kantinka FM)	97.7
University College Of Winneba (Radio Windy Bay)	98.3
Coconut Groove Beach Resort & Conference Centre (Ahomka FM)	99.5
Adom Ne Aseda Foundation (Epadac) (Hope FM)	99.9
University of Cape Coast (Atl FM)	100.5
Yesterday''s Pal Company Limited (Yes FM)	102.9
Yaw Asamoah & Sons (Spark FM)	103.5
Bisease Development Association (Breezy FM)	105.3
Bekay Investment Company Limited	107.5
Omega 3 Communication Limited	87.5
Volta Region	
TONGU COMMUNITY RADIO 24 – 03 - 09 92.1mhz On Air Tongu Community FM	92.1
Ghana Broadcasting Corporation (Volta Star)	91.5
Vidof (Lorlornyo FM)	93.3
RADIO STATIONS Continued	
Ghana Broadcasting Corporation. (Volta Star Relay)	95.5
Victory FM Limited	96.1
Multi Systems Prestige Company Limited.	96.9
Ho Polytechnic. (Volta Premier FM)	98.1
Holy FM Ltd.	97.5
Light Communications & Other Services (Light FM)	101.1
Voice Of Volta Network Ltd.	102.1
13. Abochanel Media Group Limited (Dela Radio)	105.7
Vision 3 Communications Ltd. (Jubilee Radio)	106.9
15. Amlima Establishment Ltd.	107.3
Elite Multimedia Company Limited	93.1
Northern Region	
Theovision International	88.3
Ghana Broadcasting Corporation. (Radio Savanna Relay)	88.9
Acapella Media Co. Ltd. (Filla FM)	89.3

Ghana Broadcasting Corporation. (Radio Savanna)	89.5
Northern Star FM Ltd. (North Star FM)	92.1
Makenba Broadcasting Co. Ltd. (Diamond FM)	93.7
Tizaabuni Multimedia Company Limited	94.1
15. Ghanaian Danish Communities Association(Gdca) (Radio Simili)	95.3
Bishara Radio	97.7
Upper West Region	
Ghana Broadcasting Corporation (Radio Upper West)	90.1
Foundation for Rural Educ. Empowerment And Dev. (Freed)	92.3
Ghana Broadcasting Corporation. (Radio Upper West Relay))	93.9
Mass Media for Development. (Radio Progress)	98.1
Miidan Educational Trust (Radio Ford)	107.5
Upper East Region	
Rural Waves Network	88.3
Ghana Broadcasting Corporation. (Ura Radio)	89.7
Zurigaloo (Nabiina Radio)	90.7
Radio Bliss Comp. Ltd.	94.7
Radio Style	99.3
Agreed Best Communications Ltd. (Super A One Radio)	101.1
Foundation for Intergrated And Strategic Dev't (Radio Builsa)	106.5

LIST OF TV STATIONS ACROSS THE TEN REGIONS

TV STATIONS	Greater Accra Region	Eastern Region	Central Region	Brong Ahafo Region	Ashanti Region	Western Region	Volta Region	Nortern Region	Upper East Region	Upper West Region
Ghana Broadcasting Corporation (GBC)-GTV	x	x	x	x	x	x	x	x	x	x
TV3 Networking Limited	x	x	x	x	x	x	x			
Metropolitan Entertainment Television - Metro TV	x	x	x	x	x	x	x	x	x	x
Television Africa Ltd. - TV Africa	x	x	x		x	x				
Crystal Radiovision Network Ltd. - Crystal TV	x	x								
Multichoice Ghana - DSTV, DSTV Mobile	x	x	x	x	x	x	x	x	x	x
CATV Limited - Cable Gold	x									
Net 2 TV Limited - Net 2 TV	x	x								
Wilsad Support Promotion Services - Sskyy Digital	x	x			x	x				
Independent TV Limited	x									
K & N Investments Limited - e - TV	x	x								
Multimedia Broadcasting Company Ltd. - Multi TV	x	x	x	x	x	x	x	x	x	x
Viasat Broadcasting Ltd. - Viasat 1	x	x	x		x	x	x			
Black Star Television - Fon TV	x									
Multiple Concepts	x									
The Cardinal Foundation for Distance Learning	x		x							
Strong Digital Technologies Ltd	x									
Smart TV	x									
Centre for Intercultural Learning Talent & Development, AGORO - Coastal TV			x							
Black Star Television - Fon TV					x					
Total	**18**	**11**	**9**	**5**	**9**	**8**	**6**	**4**	**4**	**4**

17.6 Committee Members

17.6.1 Oversight Committee Members

- Mr. Ebo Hawkson
- Ahuma Ocansey Bosco
- Mr. Magnus Ebo Duncan (formerly of Ghana Statistical Service)
- Mr. Ocran (Ghana Statistical Service)
- Abraham Adjetey
- Rex Owusu Marfo
- Kwame Nsia Appau
- Yaw Oxbon

17.6.2 Technical Committee Members

- Dr William Ahadzie
- Prof John Collins
- Mr Michael Ayirebi
- Mr Bice Osei Kuffour
- Mr Alex Openyah Anyetei
- Rev Fiifi Khan Agyarkwah
- Korkor Amarterifio

- Jonathan Cudjoe
- Amy Appiah Frimpong

18 Bibliography

Acquah, E. O. (2000). *New trends in Asafo music performance, a case study of Kyirem Asafo, Ajumako Mando, Ghana.* Accra: University of Ghana Press.

Adzei, M. (2004). *The Gbedze traditional warfare music of Tsito-Awudome in the Volta Region.* Accra: University of Ghana Press.

Agordoh, A. A. (2000). The Present State of Church Music in Ghana. *Research Review New Series* , 31 - 37.

Aheneba, D. T. (2005, January 13). *Dances and meaning*. Retrieved August 21, 2013

Amenlema, C. K. (2006). *The Abisa of the Nzema: A study in socio-musical change.* Accra: University of Ghana Press.

Amo, E. K.-D. (2013, September 18). Immigration Bands. (KPMG, Interviewer)

Antwi, M. K. (1988). *Kete Drum Music.* University of Ghana, School of Performing Arts. Accra: University of Ghana Press.

Arko, T. (2013, September 17). Fire Service Bands. (KPMG, Interviewer)

Authority, G. T. (2008, May 13). *Ghana Tourism*. Retrieved September 2, 2013

Bohlman, P. (1999). *Excursions in World Music.* New Jersey: Prentice Hall College .

Boyer-Dry, J. (2008). *Transforming Traditional Music in the Midst of Contemporary Change: The Survival of Cultural Troupes in Accra, Ghana.* Connecticut: Wesleyan University Press.

Collins, J. (1996). *Highlife Time.* Accra: Anansesem Press.

Copyright, O. (2010, January 13). *Protecting Your Intelectual Property*. (S.B.J. Ventures and Proweb Solutions) Retrieved September 4, 2013, from Ghana Copyright Office.

Council, G. E. (2006). *Market Brief for Djembe Drums Exports to the United States of America.* Accra: Ghana Export Promotion Council.

DeNora, T. (2000). *Music in Everyday Life.* Cambridge: Cambridge University Press.

Ebonyi, C. S.-K.-D. (2013, September 19). Armed Forces Central Band. (KPMG, Interviewer)

Government, G. (2013, August 3). *Government of Ghana Official Portal*. Retrieved September 3, 2013, from http://www.ghana.gov.gh/

Hallam, S. (2010, August 1). The power of music: its impact on the intellectual, social and personal development of children and young people. *International Journal of Music Education* , pp. 1-22.

Hays, T., & Minichiello, V. (2005). *The contribution of music to quality of life in older people: an Australian quality study.* Cambridge: Cambridge University Press.

Hupkorti, A. S.-H. (2013, September 18). Police Bands. (KPMG, Interviewer)

Kwarteng, K. A. (1988). *Odansuom.* Accra: University of Ghana Press.

Lawrence, B. (2005, June 04). *Ghana Goods*. Retrieved September 13, 2013

ModernGhana. (2005, August 5). *Modern Ghana Media Communications Limited*. Retrieved September 13, 2013

MUSIGA. (2012, January 5). *Musicians Union of Ghana*. Retrieved September 3, 2013, from http://www.musiga.org.gh/

Nation, G. (2006, January 13). *History of Ghana Music*. Retrieved September 17, 2013, from Ghana Nation: www.ghananation.com/music

Otoo, V. K. (2006). *Recording Studios: Their role in the development of the music industry in Ghana.* University of Ghana, School of Performing Arts. Accra: University of Ghana Press.

Pedersen, M. M. (2008). *Microfinance in the Ghanaian Music Industry.* Odense: University Printing Press.

Roy, W. G. (2010). *Reds, Whites, and Blues: Social Movements, Folk Music and Race in the United States.* Princeton: Princeton University Press.

Service, G. S. (2005). *2000 Population and Housing Census.* Accra: Ghana Statistical Services.

Service, G. S. (2012). *2010 Population and Housing Census.* Accra: Ghana Statistical Service.

Wikipedia. (2013, November 4). *Ewe People*. Retrieved November 7, 2013

WordPress. (2008, May 7). *The Significance of the Ghanaian Traditional Dance;The Case of the Adowa Dance*. Retrieved August 13, 2013, from Rudell's Weblog: http://rudell.wordpress.com/

Younge, P. Y. (2001, May 14). *Azaguno Repertoire*. Retrieved August 12, 2013, from Dances from West Africa: http://www.azaguno.com

Contact us

Daniel S. Adoteye
Advisory
T +233 0302 766305 / 766311
E dadoteye@kpmg.com

Evans Asare
Advisory
T +233 0302 766305 / 766311
E easare@kpmg.com

www.kpmg.com