



The Big Survey 2022

Topic 1 – groups’ income

This report reflects the answers to the first 10 questions of the survey, focussing on all aspects of music groups’ income.

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OVERALL SUMMARY

Clearly, the leisure-time music sector has suffered over Covid: many figures show a slowdown compared to pre-pandemic data.

Volunteer promoters seem particularly fragile: their numbers and their income are steadily declining. These groups, run by volunteers, present professional soloists and small ensembles in concert, often facilitating access to excellent professional music events in communities where there is no other provision of this kind.

Promoting groups have operated for decades with a subscription model whereby audiences bought into a season, thus giving these volunteers the cash flow and confidence to book professionals for their events. Changing audience behaviours, accelerated by Covid, are now undermining this model: audiences do not subscribe to entire series of events but tend to book last minute; and some have also been slow to return to live events.

The whole leisure-time music sector is now worth around £180m a year (including groups not in Making Music membership), and that is for 2022, i.e. still in the spell of Covid, and not including the secondary financial impact of groups on local areas’ night time economy, venues, hospitality, transport, music accessories, teaching, etc..

1.1 Income sources

Where our groups’ incomes typically comes from, and how it is broken down by source.

Source	Promoters (% of income)			Performing Groups (% of income)		
Funding Local Authorities, other public monies (e.g. Arts Councils), trusts	17.55	(17.3)	(17)	5.1	(3.62)	7.5)

Business (cash, in kind, sponsorship)	2.52	(2.75)	(5.5)		1.31	(2.31)	(2.5)
Donations from individuals Friends/patrons; legacies; one off/ regular donations; at fundraising events	21.59	(16.1)	(15)		13.46	(7.74)	(8.2)
Trading/earned income Ticket sales, fees, advertising, programmes, merchandise	34.58	(27.8)	(30)		32.05	(39.1)	(36)
Membership subscriptions	21.12	(35.4)	(33)		44.79	(45.8)	(46)
Tax reliefs Gift Aid, Orchestra or Theatre Tax Relief	1.54	(0.55)	n/a		3.04	(1.44)	n/a

KEY: **2022** (2016) (2013)

COLOURS: they highlight the top three income sources **1** **2** **3**

For performing groups, the top three sources of income have remained the same over the last 10 years (same highlight colouring).

- Membership subscriptions are steady, and the top source of income, at about 45%.
- Trading income has reduced by 18% since 2016, likely an impact of Covid, to around 32% of groups' income.
- This shortfall has been made up with a 70% increase in individual donations to around 13.5% of overall income.
- External funding has also increased 40% from 2016, albeit from a very low base and still not at the level of 2013.
- Business support has halved, although it has always been miniscule
- The uptake of Gift Aid and more recently Orchestra Tax Relief has more than doubled but is still small compared to groups' eligibility.

For promoters, the story is very different. The top three income sources were stable until the pandemic, but Covid has accelerated a major change which was starting to show pre-pandemic: a veritable collapse in membership subscriptions and change in income sources.

- Membership income is 60% lower than in 2016, and in third (instead of first) place.
- Trading is now in first place, no doubt reflecting increased ticket sales per concert, rather than for a series (which is what a subscription buys)
- Donations are in second place, also strongly increased
- Funding remains steady at approximately 17%, but is now no longer in the top 3.
- Promoters raise over 3 times as much of their income via funding than performing groups

Comment

For performing groups, it is now a matter of returning to pre-Covid levels of income in terms of membership subscriptions and trading income, and we are confident that will happen before the next set of data in 2026.

It may be hard to maintain recent higher donation income, as much of that may have been related to participants' support for groups during Covid.

Funding has only ever been a small part of groups' income. Barriers include the resource required to make applications, the restricted nature of such funding and onerous reporting requirements: it is thus better suited to special projects, less to a group's 'normal' activity.

Business support is small and declined further during Covid: but given the local economic impact of groups, perhaps this is an area with potential to expand income.

The biggest area of potential future income is from tax reliefs including Gift Aid and Orchestra or Theatre Tax Relief. 91% of Making Music members are charities and at least 600-700 are instrumental groups eligible for Orchestra Tax Relief, therefore far more groups could claim these reliefs than are currently doing so.

For volunteer promoters, Covid has clearly accelerated a trend seen pre-Covid of rapid decline in membership subscriptions, putting their operating model at risk.

Trading income and donations have for now compensated to some extent for this loss, but clearly they need to be maintained, if not grown, in order to fully compensate for the loss of guaranteed income via the previously successful annual subscription model.

What will Making Music do?

- **Help more (performing) groups use Orchestra/Theatre Tax Relief**
- **Help more (performing or promoting) groups claim Gift Aid**
- **Campaign for the introduction of Choir Tax Relief**
- **Provide more resources on business sponsorship and commercial relationships**
- **Support promoting groups to develop their operating model**

1.2 Membership subscriptions

Most performing or promoting groups operate through a subscription model to self-finance themselves and this is (was, in the case of promoters) their largest source of income.

Cost of membership (per year)	Promoters (% using)			Performing Groups (% using)		
	2022	2016	2013	2022	2016	2013
No subscription	27.63	(16.82)	(20.21)	5.5	(4.57)	(6.2)
£1-25	25	(24.3)	(26.6)	3.1	(3.91)	(6.04)
£26-50	13.16	(24.3)	(21.28)	7.24	(11.3)	(14.19)
£51-100	26.32	(33.64)	(28.72)	27.07	(42.39)	(44.37)
£101-150	6.58	(0.62)	(1.46)	28.45	(25.07)	(18.93)
£151-250	0	(1.25)	(2.13)	22.41	(12.54)	(9.46)
More than £250	1.32	(0.93)	(0)	6.21	(1.74)	(0.82)

KEY: 2022 (2016) (2013)

COLOURS : they highlight the top three subscription brackets 1 2 3

For performing groups:

- subscriptions in the top 3 brackets have doubled in the last 10 years and those in the lowest three brackets have reduced by 42%
- the average subscription was £77 a year (£1.50 a week) in 2010 and is now £127 a year (£2 a week)
- the most frequent membership subscription bracket is now £101-150, taking top spot from the £51-100 band

Music groups are an affordable leisure-time activity: over 50% costing a participant between £5 and £10 a month. Only 20% of groups will now cost £15 a month or more to take part in.

For volunteer promoters:

- the most noticeable trend is towards an operating model without subscriptions: up 37% since 2016; over a quarter of promoters now do not have a membership scheme

- for those that still have subscriptions, the charges have gone from an average annual cost of £18 in 2010 to £55 a year in 2022
- nearly 3 times as many charge fees in the highest 3 brackets compared to 9 years ago, and the lowest 3 bands have declined by 16%

Concessions:

Concessions	Promoters	Performing groups
Under-18s	32.39%	23.86%
Full-time students	42.25%	41.34%
Young people (under 30)	18.31%	16.21%
Families	5.63%	2.19%
Aged 60 or over	5.63%	7.1%
Unwaged/low income	8.45%	31.87%
Disabled people	5.63%	2.55%
Cheaper rate paying whole term/year in one go	9.86%	8.74%
At request of member/ discretion of group	n/a	8.01%
Other	9.8%*	4%**
NO CONCESSIONS	22.54%	24.41%

Notes to the table:

* mainly for people at same address; subscription to a promoting group usually buys concert attendance, often a family activity

** this includes: early payment/via direct debit; non-attendance; long term members; carers; youth choir; inactive members/members attending virtually; asylum seekers; several members of one household

Other ways listed by members to mitigate subscription costs for participants: member decides contribution; concession in exchange for expertise which helps the group; new starter taster fee; voluntary fee; pro-rated if joining later in the term/year

COLOURS: they highlight the top three concessions **1** **2** **3**

- 76% of performing groups offer concessions, with the highest percentage of concessions for students and unwaged/low income participants
- Over 77% of promoters offer concessions, with the highest percentage of concessions for students and for under-18s.
- Compared to performing groups, only a quarter as many promoters (8%) focus on low income household
- Twice as many promoters than performing groups cater for disabled people
- Neither has a strong offer for families or over-60s
- Noting the prevalence of disability in the population (over 18%), there is more groups could do to facilitate the participation or attendance of disabled people
- Performing groups are over 3 times as likely to accommodate those on low incomes and have come up with a range of ways of doing so: pay what you can; no set subscription; up to 100% concession at the discretion of the committee; etc..

What will Making Music do?

- **Address membership subscriptions with members, facilitating discussion and providing resources, including as part of our access and inclusion work**
- **Facilitate discussion and modelling around concessions**

1.3 Gift Aid

- 85% of **performing groups** are eligible to claim Gift Aid, but only 65% are registered to do so. Only 56% report over half of their subscribers gift aiding their contributions.
- 57% of **promoters** are eligible to claim Gift Aid, but only 38% are registered to do so. Only 20% report over half of their subscribers gift aiding their contributions.

More groups could derive a steady annual income stream by registering for Gift Aid.

What Making Music will do:

- **Making Music will make Gift Aid access a priority, making it easier for music groups to access this important tax break over the next few years.**

1.4 Money raised for charity

Annually, Making Music members raise £1,876,799 for other charities.

The UK's 13,800 music groups raise around £6 million for charities each year.

This does not include in-kind support, where groups play/sing at charity events for free, in order to enable the charity to raise more funds for itself directly.

What Making Music will do:

- **Highlight this figure in its advocacy for groups**
- **Encourage groups to use this figure to encourage new participants to join them: raising funds for charity is a frequent motivation for joining a music group**

1.5 Total income

Here we aggregate Making Music members' total income. We have also calculated the total value of the leisure-time music sector overall.

Year	Total income promoters	Increase/ decrease since 2010	Number of promoters	Increase/ decrease since 2010
2022	£6,436, 737	-11%	399	-4.55%
2016	£5,634,066	-22%	441	+5.5%
2010	£7,218,000		418	
	Total income performing groups		No. of performing groups	
2022	£45,626,470	+29.76%	3,573	+31.65%
2016	£42,330,794	+20.38%	2,714	+12.61%
2010	£35,162,423		2,410	
	Total value of leisure time music sector (13,800 groups)		Increase/ decrease since 2010	
2022	£179,528,300		+22.85%	
2016	£165,396,069		+13.17%	
2010	£146,139,390			

COLOURS – light blue – these are the summary lines that tell the story

Comment

For performing groups, income slowed considerably over the Covid years, compared to before 2016. However, overall, since 2010, increases in income have nearly kept pace with the increase in numbers of such groups in Making Music membership.

For volunteer promoters, their numbers have reduced by nearly 5% since 2010, but their income has reduced by even more - 11%.

The figures at the end of the table indicate that **the entire leisure-time music sector is now worth around £180 million annually. This is without factoring any indirect economic impact from these activities** on venues, suppliers, the local economy through equipment purchases, 1-2-1 teaching, local hospitality, printing, transport, and so on.

What Making Music will do:

- Highlight this figure in its advocacy for groups and for the sector
- Help performing groups return to pre-Covid financial health
- Help promoters to develop new models and attract new volunteers and audiences

1.6 Do groups break even?

	Promoters				Performing groups		
Make a loss most years	23.38%	(27.55)	(17.20)		14.81%	(20.32)	(22.68)
Break even, occasional small loss	27.27%	(38.78)	(38.71)		28.57%	(24.66)	(25.33)
Break even, occasional surplus	31.17%	(28.57)	(37.63)		41.99%	(45.21)	(44.87)
Regularly make a surplus	18.18%	(5.1)	(6.45)		13.76	(8.9)	(7.12)

2022 (2016) (2013)

Performing groups' finances have shown steady improvement: twice as many now make a surplus than did 10 years ago; and a third fewer make a loss most years. 84% now break even or make a surplus, whereas only 77% of them did in 2013 – a 10% improvement.

It is the exact opposite for **promoters**: 36% more now make a loss most years, though there has also been a threefold increase in those who regularly make a surplus. Overall, however, only 77% of them now break even or make a surplus, when 83% of them did 10 years ago.

What Making Music will do:

- Work with all groups to help them find financial sustainability for their activity
- Focus specifically on promoters to help them develop activity and audiences

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