

Topic 2 – Expenditure: professionals and music

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OVERALL SUMMARY

This report reveals the considerable **contribution of around £123m that leisure-time music groups make to the earnings of professional musicians per year**. Around a third of that is for musical directors/conductors/leaders of groups; the other two thirds for accompanists, instrumental or vocal soloists, small ensembles or entire bands or orchestras for concerts.

The total of £123m, when set against the £1billion total earnings of the UK’s 46,500 musicians at the Musicians’ Union average of £20,700 per year (2023 census), means leisure-time music represents as much as 12% of freelance musicians’ income.

A quarter of the leisure-time music sector regularly commission new music and arrangements (promoters as well as performing groups), to the tune of around **1,100 pieces per year**, significant financially for music creators and music publishers, who also benefit from the use of sheet music by 98% of (performing) music groups.

For sheet music sources, groups favour free sources (e.g. out of copyright material), for obvious budgetary reasons; the second most used option is to buy their music, meaning it can be used repeatedly. Hiring new music, the most expensive option, is least used, a clear barrier to the promotion and repeated performance of new music.

2.1 Musical leaders – *performing groups only*

Musical Leader and their financial relationship to group	
We do not have a musical leader	2.12%
We have a musical leader; they are not paid	16.22%
We pay our musical leader	80.95%
Expenses only	0.88%

98% of performing groups have a musical leader. 81% of musical leaders are paid.

Assuming a minimum of 13,500 performing groups in the UK (based on 2008 data, in reality, figures are likely to be higher), that means **around 10,000 paid roles for professional conductors and choir leaders across the UK**. However, most musical leaders conduct several groups, so the 10,000 roles probably represent a lower number of individuals.

Musical leaders are paid a wide range of fees. For rehearsals this can be anything from £5 to £100 an hour; for events this increases from £8 to £500 an hour. **The average hourly rate for rehearsals is £43 an hour, and for events £86 an hour.**

Many groups agree a fee with their leaders based on a 'rehearsal fee/rate' and an 'event fee/rate'. Others agree an annual fee, based on an agreed number of rehearsals and performances, often with additional fees for additional events or rehearsals.

Comment

It is often underestimated what a significant contribution to professional musicians' livelihoods the leisure-time music sector makes. 10,000 roles at the average rate emerging from our survey would indicate a **total of £41m or so for musical leaders alone**, assuming around 39 rehearsals and 3 performances per year.

There is a lack of support and CPD for musical leaders, especially for less well networked choir leaders and for instrumental group leaders. The development, training and support for these leaders would and does make a difference to this sector, where it exists. Even where it does exist, however, take-up is not universal, presumably because these are freelancers paying for their own CPD and thus having to prioritise fee-earning work.

What will Making Music do?

- Encourage Making Music members to pay appropriate fees to musical leaders
- Agree recommended fees with the Musicians Union
- Keep highlighting the need for support and development of these leaders to relevant networks (e.g. Association of British Choral Directors, Natural Voice Network, MD Brunch, conservatoires, band directors' associations etc.)

2.2 Performing groups – other music professionals

Across the whole Making Music membership, **our performing groups annually offer around 39,000 engagements for professional musicians** - accompanists, soloists, workshops leaders, instrumentalists, vocalists, and whole bands or orchestras, **spending around £21 million** on these (in addition to their spending on their music leaders).

The numbers have been stable over a long period of time, meaning an average of **approximately 10 professional musicians are engaged per group per year, in addition to their musical leader or conductor.**

Comment

When, during Covid, government permitted the return of professional musical activity initially, but not that of leisure-time musical activity, they couldn't understand why musicians were still struggling. These figures provide the answer: given the freelance and portfolio nature of almost all musicians' careers, restoring some, but not all of that earning potential, still left musicians seriously out of pocket.

We must remember, too, that these figures relate to Making Music members only – a mere 30% of the sector. **Scaled up to the whole of the leisure-time music sector, spending by groups on professionals is therefore more likely to be worth around £70m.**

What will Making Music do?

- **Keep reminding policymakers that the leisure-time music sector is not just a ‘nice to have’ for reasons such as health, well-being, etc., but packs an economic punch too, as a vital part of the musician’s freelance portfolio**
- **Seek to encourage more research into the economics of leisure-time music activity, to support advocacy for it**

2.3 Volunteer promoters – professional musicians

Our promoters are volunteers, presenting professional musicians in concert. They can operate as clubs, or stage festivals, offer a series of concerts over a shorter or longer period and often include workshops for audiences or young people in their programming, too.

Their often-small-scale chamber concerts, frequently in places other professional music organisations do not reach, fill a unique gap in the concert constellation – the classical, jazz or folk equivalent of grassroots (rock and pop) music venues, providing high quality musical events on an intimate scale, allowing audiences to experience professionals up close and often to witness stars in the making.

Our promoter members annually engage around 8,780 professional musicians at a cost of over £3.6m. This averages out at £411 per musician, with approximately 22 musicians per promoter per year, a figure which has remained stable over the last 20 years. This means that there have been regular engagements on offer for performers, usually soloists, duos and small ensembles, year in year out, via a network of around 400 promoters around the UK.

Comment

Again, these figures are likely to be far higher in reality. Most Making Music promoters’ offering is broadly classical music. In addition, there are scores of jazz and folk promoters around the country, perhaps fewer in number than the classical promoters, but organising far more – often weekly – small scale events in their communities.

There are even fewer data on the number of volunteer promoters than there are on performing groups. Were we to assume again that Making Music represents around 30% of the total sector, scaling up would see **volunteer promoters responsible for £12m income for professional musicians.**

Combined with performing groups, there is a minimum of £82m worth of economic benefit for professional musicians being created by leisure-time music groups and volunteer promoters every year, plus an estimated £41m to musical leaders.

That gives a total of £123m being paid out to professional musicians every year.

The Musicians’ Union census (2023) put the average income of a musician at £20,700 a year, and statista.com sets the number of professional musicians in the UK at 46,500. Total income of 46,500 musicians at the MU’s average would therefore be around £1billion. Of this, **earnings from leisure-time music groups, at £123m annually, represent around 12% of professional musicians’ total income.**

What Making Music will do:

- **Seek to encourage more research into the economic impact of leisure-time music groups and volunteer promoters to help us – and them – make a better case for the essential infrastructure they relies on, e.g. affordable local spaces.**
- **Remind policymakers and other stakeholders that this financial value is being created by volunteers at no cost to government. Value which may disappear with the sale of local authorities’ venues, the increasing pressures on community halls, the withdrawal of places of worship from community use when they close down.**

2.4 Performing groups & volunteer promoters: commissioning

28% of performing groups and volunteer promoters commission new music. We asked them for the number commissioned in the last 5 years, as this is not necessarily something groups do every year – both a question of cost and of effort: identifying, briefing, engaging a composer, the time taken to finalise a piece, the perhaps extended rehearsal time required.

Between them, our groups commissioned around 324 pieces a year. If that reflects the wider sector – including not those in Making Music membership -, then **leisure-time music groups are responsible for around 1,100 new pieces of music a year**, a considerable contribution for those looking to make a living from writing music, and considerably more than all the professional organisations, including the BBC, taken together.

In addition, performing groups commission a significant amount of arrangements. These are not usually as highly paid as commissions, however, where a music creator shows a talent, for instance, for barbershop or brass band arrangements, this may become a steady source of commissions and therefore income, particularly from repeat performances.

25% of performing groups commission arrangements; Making Music members which are brass bands, wind bands, single instrument ensembles or barbershop/a cappella choirs are the kinds of groups most likely to use arrangements to allow them a wide range of repertoire, as there is less music written for them specifically. Around 180 arrangements per year are commissioned; again, scaling this up to the whole sector, it would indicate a minimum of **600 arrangements commissioned by leisure-time music groups each year.**

Comment

We did not ask for the financial outlay on these commissions and arrangements but certainly plan to do so next time – it is clear that whilst leisure-time music groups are small, it is their sheer number which means that professionals such as music creators can derive a steady contribution to their income from this sector. It may be that many of these pieces are quite short, but this will be another interesting piece of information to ascertain in future.

We are also conscious that frequently new music is performed once – at premiere – and never again, something addressed with the Association of British Orchestras/PRS Foundation Resonate project, not currently open to leisure-time music groups.

However, we are also aware anecdotally that it is far more likely that, having commissioned a new piece or an arrangement, leisure-time music groups will perform these repeatedly if the pieces successfully chimed with their members and audiences. Again, this means a greater contribution towards living composers' income than that provided by professional organisations. Only the BBC, as we understand (Research into the classical music ecosystem, 2022), usually performs pieces it commissions multiple times.

What Making Music will do:

- **Highlight the commissioning figures in its advocacy to music sector organisations, policy makers and other stakeholders**
- **Ask additional questions at the next survey about the financial value and length (minutes) of these commissions (new or arrangements), and how often they have been performed**

2.5 Sheet music use and sourcing (performing groups only)

98% of respondents use sheet music, either printed or digital, for their activity.

67% of groups source at least some of their music for free: using their own stock, borrowing from other groups, via Making Music or other online listings, and from the International Music Score Library Project (IMSLP); **spending only 3% of their music budget on these sources** (there are usually admin costs/postage etc. attached).

9% of respondents didn't use any free sources. 7% used ONLY free sources. 28% use free sources for more than 50% of their music.

56% of groups source at least some of their music from music libraries. These are public or may be charitable, for example the Community & Youth Music Library or New Surrey Performing Arts Library (NewSPAL). **Groups spend 25.5% of their music budget on music libraries.**

12% didn't use music libraries at all. 6.6% used ONLY music libraries. 24.5% use music libraries for more than 50% of their music.

33% of groups use at least some of their own compositions or arrangements – these will often be done by the group's musical leader, perhaps as part of their work for the group or perhaps paid separately. For many groups, this is essential to enable them to play/sing a wide variety of repertoire, where perhaps there is not much originally written for their instruments/voices. **Groups spend 9.4% of their music budget on these.**

1.5% didn't use any own compositions or arrangements. 3.5% used ONLY own compositions/arrangements. 5% use own compositions or arrangements for more than 50% of their music.

35% of groups hire at least some of their music from music publishers or similar commercial outlets. This tends to be an expensive option, reflected in the low use of this option. Nonetheless, **groups spend 22.6% of their budget on these commercial hires.**

6% didn't use commercial hires at all. 0.5% used ONLY commercial hires. 4% use commercial hires for more than 50% of their music.

62% of groups buy at least some of their music from music publishers or elsewhere. This also tends to be an expensive option, though variable according to genre, length of piece etc., and at least groups are then able to perform this repertoire again and again. **Groups spend 33.7% of their budget on buying music this way.**

7.5% never buy any music. 9% buy all of their music. 18% buy more than 50% of their music.

In total, music groups (scaled up to the sector of which Making Music represents around 30%) **spend an estimated £5.7m a year on sheet music, of which £3.2m to hire or buy from music publishers and other commercial outlets.**

Comment

Groups need a vast variety of music in order to put together programmes that are of interest to their participants, and their audiences. With limited budgets, they source their music from a wide range of sources, balancing pricier ones with free ones.

However, it is clear free sources of music are by far the front runners; buying their music is groups' second most favoured option, presumably so that repertoire can be used repeatedly, making this cost effective in the long run. Affordable music libraries are the third most favoured option.

Perhaps more widespread than expected is the extensive use of own compositions or arrangements.

The biggest proportion of a groups' music budget is spent on buying music; followed by music libraries and then hires. However, in terms of value for money, you get 'more' music for your budget from music libraries than you do from commercial hires or buys.

Buying seems more cost effective than commercial hiring, confirming members' claims over many years that music publishers hire prices are not accessible to leisure-time music groups, especially for new music. This goes counter to publishers' stated ambition to ensure that newer repertoire and living composers are performed more widely and suggests a simple remedy for that to happen – to introduce special prices for leisure-time groups, as other countries (e.g. South Korea) have done.

Inter Library Loans (ILLs) were also asked about in this survey: this refers to the ability to borrow sheet music from libraries other than your local one, as you can with books. **36% say their local library offers Inter Library Loans for music; 14% say that it does not. 50% of groups don't know.** Whilst not directly related to groups' expenditure, the availability of this service impacts on their costs, as it restricts what they can source affordably and locally.

In recent years, fewer and fewer public libraries have offered ILLs, highly prized by groups for delivering a variety of repertoire practically onto their doorstep, due to the financial problems besetting local authorities. The true cost of Inter Library Loans has in the past not been passed on to groups and as a result this service is often stopped, rather than recharged realistically.

This service also suffers from the lack of joined-up digital catalogues between libraries and therefore the inability of users to self-serve. Inter Library Loans for sheet music therefore mean manual email round robins between librarians to source stocks in other libraries. This increases the unacceptability of this service to local authorities wrestling with diminishing budgets, as it is very staff time intensive.

What Making Music will do:

- **Promote the Making Music Music Bank to members, both to list their material and to borrow from fellow members**
- **Ensure members are aware of the full range of available sources for sheet music, in order to maximise the reach of their available budgets**
- **Advocate to music publishers for the crucial role of music groups in commissioning, performing and repeat performing especially new repertoire**
- **Work with local authorities and music libraries to find financially neutral and sustainable ways for them to continue providing a home to these crucial resources**

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