The Big Survey 2022

Topic 1 – groups' income

This summary reflects the top takeaways from answers to the first 10 questions of the survey, focussing on all aspects of music groups' income.

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. Their traditional subscription model is under threat by changing audience behaviours (last minute/per event bookings), accelerated by Covid.

The whole leisure-time music sector is now worth around £180m a year (including groups not in Making Music membership), even in 2022, i.e. still just post-Covid, and not including the secondary financial impact.

1.1 Income sources

For performing groups, the top three remain participants' subscriptions (45%), trading income (32%), donations from individuals (13%). There is potential for more groups to utilise tax reliefs – Gift Aid and Orchestra/Theatre Tax Relief, currently only 3% of their income.

For volunteer promoters, Covid has accelerated a collapse in the membership/subscription model, now representing only 21% of their total income, dropping from first to third place. Trading is up (to 35%), as are donations from individuals (22%). Funding remains significant at 17%, but there is also an underuse of available tax reliefs.

1.2 Membership subscriptions

Most groups operate subscriptions and these are often their largest source of income.

For performing groups

- Subscriptions in the top 3 brackets (£100+ a year) have doubled since 2013 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. Over 50% of groups cost between £5 and £10 a month per person.
- 76% of performing groups offer concessions, with the highest percentage of concessions for young people and low income participants.

For volunteer promoters

- The trend is towards an operating model without subscriptions – over a quarter of promoters now do not have a membership scheme.
- For those that still do, the average annual cost in 2010 was £18 and £55 in 2022.
- Over 77% offer concessions, fewer to low income households; more for disabled people. But the biggest percentage of concessions is for young people.

1.3 Gift Aid

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

1.4 Money raised for charity

The sum our members annually raise for other charities, for instance at their concerts, is £1,876,799.

Making Music members represent 29% of all leisure-time music groups, therefore **the UK's 13,800 music groups raise around £6 million for charities each year.**

1.5 Total income

For performing groups, despite a slowing down in income growth over the Covid years, income has nearly kept pace with the increase in numbers of such groups in Making Music membership and is confidently predicted to show a strong acceleration by the 2026 survey.

For volunteer promoters, the story is not such a happy one: their numbers have reduced by nearly 5% since 2010, but their income has reduced by 11%.

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 their local area and night-time economy, e.g. through spending on venues, suppliers, equipment purchases, 1-2-1 teaching, local hospitality, printing, transport, and so on.

1.6 Do groups break even?

Performing groups' finances overall show steady improvement: twice as many now make a surplus than did 10 years ago; and a third fewer make a loss most years.

It is the exact opposite for ***promoters***: overall only 77% of them now break even or make a surplus, when 83% of them did 10 years ago.