

Topic 2 – Expenditure: professionals and music

This report focusses on groups' expenditure in relation to music professionals, including publishers and other sources of sheet music. We will be reporting separately on expenditure on venues and spaces.

OVERALL SUMMARY

This report reveals the **considerable contribution of around £123m leisure-time music groups make to the earnings of professional musicians per year**. Around a third of this is for groups' musical directors/conductors/leaders; the other two thirds for accompanists, instrumental or vocal soloists, small ensembles or entire bands and orchestras for concerts. This figure is scaled up to the whole leisure-time music sector, of which Making Music represents around 30%.

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 (MU census 2023), means leisure-time music represents as much as 12% of freelance musicians' income.

Over a quarter of the leisure-time music sector regularly commission new music and arrangements (promoters and 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 purchase music. Hiring, the most expensive option, is least used, the price being a clear barrier to the promotion and repeated performance of new music.

2.1 Musical leaders – performing groups only

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

Assuming 13,500 performing groups in the UK (of which Making Music represents around 30%, based on 2008 data), that means **around 10,000 paid roles for professional conductors and choir leaders across the UK**. Most musical directors will lead several groups, so the 10,000 roles are likely to 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.**

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.

2.2 Performing groups – other music professionals

Our performing groups annually offer around 38,000 engagements for professional musicians, an average of around 10 professionals per group per year: accompanists, soloists, workshops leaders, instrumentalists, vocalists, and whole bands or orchestras.

Performing groups spend around £21 million on music professionals every year. Scaled up to the whole sector, of which Making Music represents 30%, that would mean **£70m annually on professional musicians**.

2.3 Volunteer promoters – professional musicians

Our promoters are volunteers, presenting professional musicians and small ensembles in concert. They annually engage **around 8,780 professional musicians at a cost of over £3.6m**, this averages out at £411 per musician, approx. 22 musicians per promoter per year.

Were we to assume here, too, that Making Music represents around 30% of the total sector, then ***volunteer promoters are responsible for £12m income to professional musicians***.

Combined with performing groups, there is thus 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, giving a total of £123m a year.

2.4 Performing groups & volunteer promoters: commissioning

28% of performing groups and volunteer promoters commission new music, about 324 pieces a year, or 1,100 scaled up to the whole leisure-time music sector.

25% of performing groups commission arrangements, around 180 a year, or a minimum of 600 if scaled up to the full sector.

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.
- 56% of groups source at least some of their music from music libraries.
- 33% of groups use at least some of their own compositions or arrangements.
- 35% of groups hire at least some of their music from music publishers.
- 62% of groups buy at least some of their music from music publishers or elsewhere.

In total, music groups (scaled up to the sector of which Making Music represents 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.

Free sources of music are the front runners for groups; buying their music is the second most favoured option, music libraries the third. Perhaps more widespread than expected is the use of own compositions or arrangements.

Buying is more popular than commercial hiring, with music publishers hire prices not accessible to many leisure-time music groups, especially for new music.