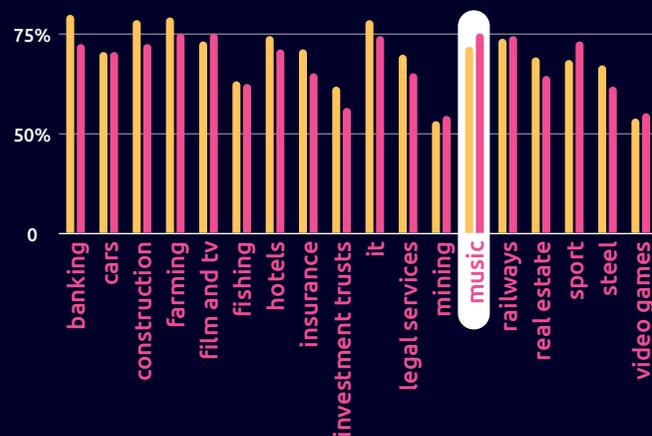


The Impact of The Music Industry

Music makes a major contribution to the UK economy. But its impact isn't just economic – it also makes a significant contribution to British society and plays an important role in all our lives. For the first time, UK Music has commissioned in-depth polling of the UK public to better understand how the music industry is perceived across the UK, the impact music has on people's lives, and what that meant during the COVID-19 pandemic.

The extensive research conducted by public policy consultants Public First demonstrates that regardless of age, gender, political views or social class, the British public overwhelmingly recognise the value and importance of music to the UK's economy, to the social fabric of the country, and to their own personal joy and wellbeing.

% important to british economy and society



Music Makes Us Proud to be British

Britain has a long a proud musical tradition stretching back centuries, from Tallis and Purcell to Elgar, Vaughan Williams and Britten. And the UK has been a global force in commercial music for decades, from The Beatles and The Rolling Stones to Led Zeppelin, Pink Floyd, Sade, Soul II Soul, Oasis, the Spice Girls, Coldplay, Stormzy and Dua Lipa, our creativity as a nation is widely known. Songwriters from Don Black to Cathy Dennis to Wayne Hector to Carla Marie Williams. Producers from George Martin to Glyn Johns to Jazzie B to John Leckie to Rollo & Sister Bliss to Camille Purcell. British musical talent is diverse and extends to every aspect of the music making process. Many are household names, but all have gained recognition amongst discerning music fans who pay attention to album and song credits.

It is a validation of this rich history that over 75% of adults say they are proud of Britain's music industry. Moreover, the social impact of music at home is widely recognised and understood. When we asked about the importance of music to British society, it came top of the list we gave – ahead of industries including sport, IT, banking and construction. In purely economic terms, music was seen as more important than insurance, cars, fishing and legal services.

Live Music Makes Us Come Alive

Music is also a social force that brings people together, to dance, sing, cheer and share good times. The restrictions and challenges that have affected everyone across the UK has not dampened the public's appetite for live music. Despite the ongoing uncertainties surrounding COVID-19, 43% of the public are interested in going to a live show. Two-thirds (66%) said they planned to attend as many or more shows than before. Among 18-24 year-olds, 38% say going to a live show is one of the things they are most looking forward to. Almost half the public (45%) are worried about the financial viability of their local music venues due to the impact of COVID-19 and 61% think local music venues are very important to their local community.

We Need Music Education

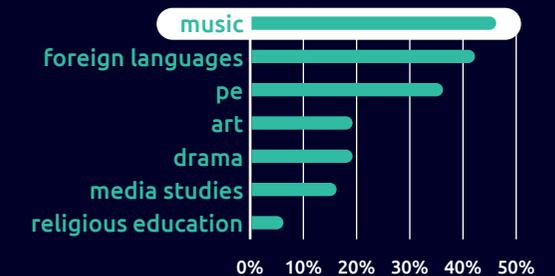
A key ingredient in the success of British music are the foundations on which musical knowledge, skills and creativity are built. This is also a key policy area for UK Music, whose MAP (Music Academic Partnership) network is a growth focused skills network, providing a link between music education and careers in music.

54% of parents stated that the quality of music education was an important factor in deciding where to send their child. 44% of adults wish that they had spent more time on music at school, and when we asked specifically music was a higher priority for more time and resources than foreign languages, PE, media studies or art.

Regardless of whether someone pursues music as a career, immersing oneself in music education enriches lives, develops character, skills and aptitude in a much broader sense. Over half of parents whose children are learning an instrument believe it has helped their children with other skills like creative thinking (56%), or boosting their confidence (54%) and encouraging perseverance and patience (49%).

A good foundation in music pays dividends and 29% of people who learned an instrument at school still play an instrument today.

what should we put more time and resource into at schools?



We are a Creative Nation

Anyone can be creative and we all have creativity within us. Sometimes that gets left behind as we grow up, as we take on responsibilities and get consumed by the grinding gears of life. We are a creative nation - almost 5 million people say they regularly create and perform music and almost 9 million have previously done so.

COVID-19 and the ensuing lockdowns brought many lives to a standstill, yet this also provided an opportunity for self exploration, personal development and for many of us to reconnect with our creative souls. The equivalent of over 1 million adults say they took up a musical instrument during lockdown and 72% of people who learned a new instrument during lockdown have said that they would continue after lockdown ended.

Music is the Soundtrack to Our Lives

The UK public listens to an estimated 60 billion hours of music a year. In total, that is the equivalent of seven million years - or as long as humans have existed.

Whether we create music or not, music is the soundtrack to our lives. Listening to music is one of Britain's favourite pastimes - second only to watching TV. 57% say they regularly listen to music while cooking or doing housework, 58% while driving and 42% while exercising.

As a nation, we like to sing. 53% of respondents sing. We do not always need a stage or a microphone or even to be cajoled into a karaoke to sing, in fact, 24% sing in the shower.

Even while we work or study, music helps us to be more productive, 71% of Britons who listen to music while they work say that it makes them more productive.

Music Defines Us and Sustains Us

In a year when many of our lives were turned upside down, the value of music in rooting each of us in who we are, in providing us with comfort, support or simply a means to relax cannot be overstated.

Music plays an important part in defining who we are - 57% feel music is an important part of their identity and 64% carefully choose the music they listen to.

We are inquisitive - 45% like to explore new artists, composers and styles of music.

Music enhances our lives, 74% of adults say that music is important to them and their quality of life, with 39% saying that this importance has increased over the last year.

Music helps us through adversity, and has been especially important during the pandemic. 57% of people say music has helped them cope with lockdown and 59% said music has helped their mental health and well-being. 50% of us use music to cheer ourselves up.

The Spillover Value of Live Music

Music events don't just benefit musicians and venue owners, but have a much wider spillover effect in the local economy, powering a wider supply chain, and encouraging significant amounts of extra spend.

On average, a medium-sized music event creates around £140,000 in additional value for the UK economy - or around seven times its direct box office revenue.¹¹ Two thirds of this value is in turn captured within the immediate area, i.e. the local constituency, supporting local jobs.

	Small Music Venue	Medium Music Venue	Large Music Venue
Spillover Impact per Event (£)	48,349	141,521	425,980
Captured in local constituency	32,995	94,312	283,879

These figures are representative of typical local music venues in towns and cities up and down the UK. The spillover from bigger music venues such as The O2 will be significantly greater and all of which multiplies into billions of pounds into the UK economy.

¹¹ We asked Public First to quantify the spillover value of live music. They did this by adding up the induced and indirect effect of ticket sales, alongside the wider GVA contribution from attendees spending on items such as accommodation, travel, merchandise and catering.

¹² Median Number of Attendees: Small Music Venue 200, Medium Venue 600, Large Venue 1,806.

The Soft Power of Music

British music is a major generator of soft power for the UK. Soft power is the ability of a country to persuade or attract others internationally through the strength of their culture. The UK has been traditionally seen as a 'soft power superpower', with influence far beyond our share of the world economy or population. Beyond its cultural impact, soft power also has important economic spillovers: encouraging more people to the country, or attracting greater levels of business investment. There are clear correlations between most measures of soft power, and the number of tourists, students and the level of foreign direct investment.¹³

Music continues to be one of the most important sources of the UK's global cultural strength. The UK is second only to the US as a source of repertoire, with BPI analysis of the top 1,000 most-streamed artists around the world in 2020 revealing that the UK accounted for 11.7% of plays - more than twice the share of the third placed country.

The cultural importance of British music abroad is widely recognised by the UK public. In our poll, we found that 59% of those we spoke to agreed that the UK's music industry helps improve our reputation abroad and 53% of those we spoke to agreed that the UK's music industry punches above our weight internationally.

British Public Want Government to do More to Support the Music Industry

The British public recognise how precious the music industry is to the UK, and that the economic and cultural success achieved is the result of hard work, risk taking, investment and commitment. 63% view music as a key national asset that brings social and economic benefits to the UK, while 59% think that music helps improve Britain's reputation abroad.

The majority of the public want Government to do more to support the music industry. 54% feel the Government should be doing more to ensure musicians can work abroad post Brexit, and 43% think Government is not doing enough to help people become professional musicians. 52% of the public think the Government should do more to support the industry as a whole.

¹³ British Council. (2017). *Soft Power Today - Measuring the Influences and Effects*. Available: https://www.britishcouncil.org/sites/default/files/3418_bc_edinburgh_university_soft_power_report_03b.pdf.